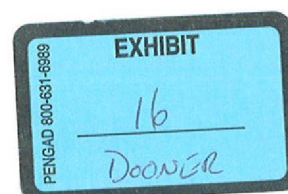


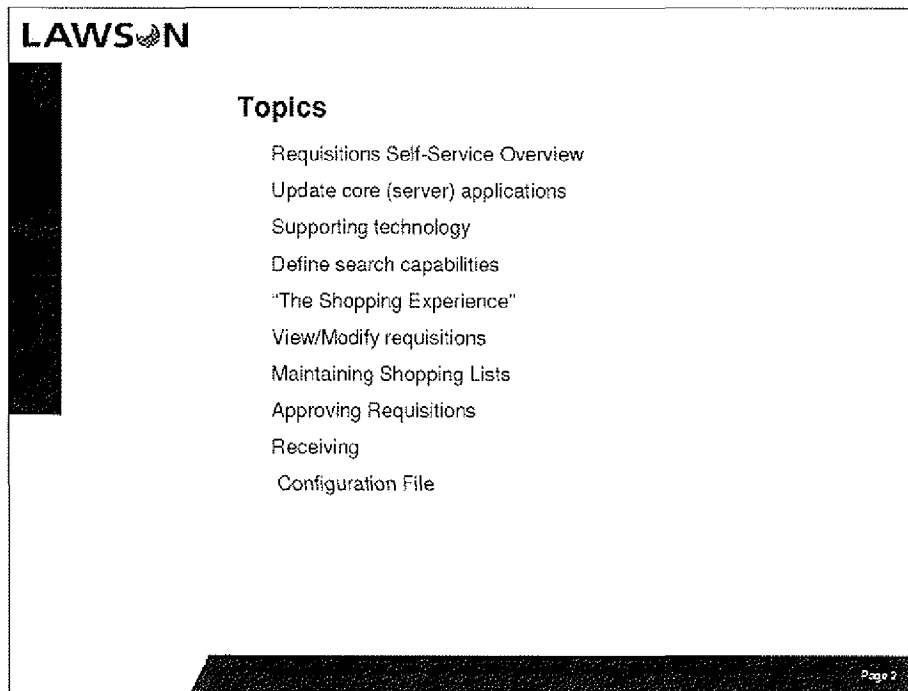
PX-136

PX-0136



Welcome to this presentation on Requisition Self-Service 8.1, 9.0. This presentation is applicable to the Requisition Self-Service 81053 release for 8.1 and the 9.004 release for 9.0. Many of the features and functions are available in previous version, however there were many new changes added to the 81053 and 9.0004 releases. So if you have previous version for Requisition Self-Service, some of this presentation may still be applicable.

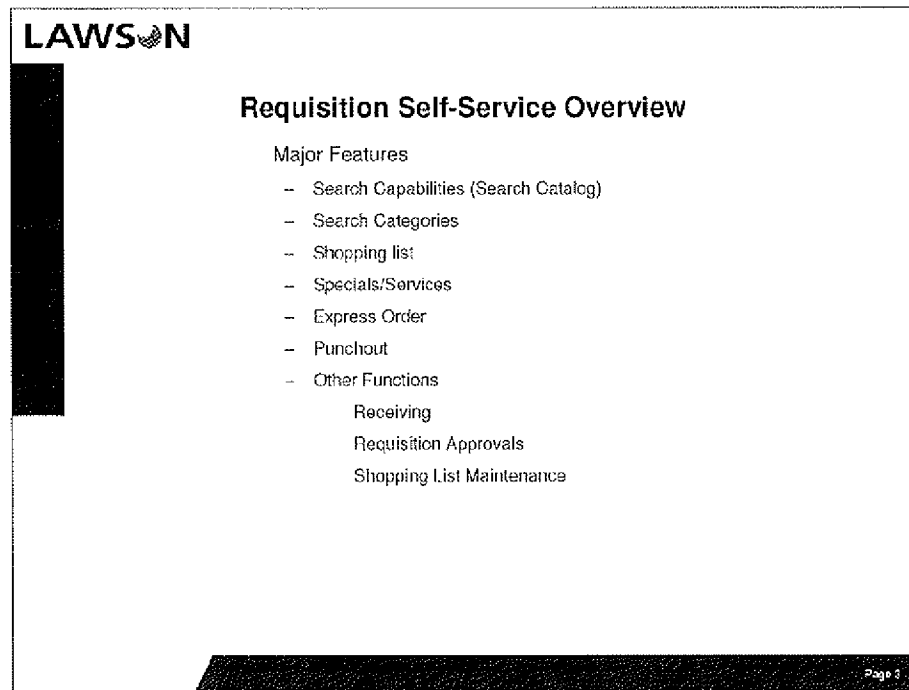




This presentation will cover an overview of Requisition Self-Service, setup needed for the core application and other supporting technology setup needed for specific functions within Requisition Self-Service.

This presentation will address how to define search capabilities and show you the shopping experience based on some of your setup option or choices you may have made.

Within Requisition Self-Service you will have the ability to view/modify requisitions as well as maintain shopping list. This presentation also covers approving requisitions, receiving and the Requisition Self-Service configuration file that may affect your processing and options within Requisition Self-Service.



Requisition Self-Service has many great features. Such as multiple search capabilities. You can search the catalog, which will search for items in your item master or vendor items. It also allows you to search on keywords for up to 29 fields based on your setup.

You can also search based on categories, which can use the UNSPSC code categories. UNSPSC stands for United Nations Standard Products and Services or Universal Standard Products and Services Classifications which provide designated categories for items. UNSPSC codes were developed by the United nations in association with Dunn & Bradstreet. It has four level, segment, family, class and commodity.

Express Order allows you to quickly order an item if you know the exact item number for the item in the Item Master.

The shopping list allows you to choose items based on a Procurement Template you create in PO15.

Punchout allows you to access vendor websites, shop and return selections to a Lawson Requisition. The user access a Vendor Managed catalog where items and prices are determined by trading partners relationships. so each Punchout experience is unique.

Additional features include the capability to do receiving within Requisition Self-Service, Approve Requisitions and maintain procurement templates you can access through the shopping list. These other functions are bundled into Requisition Self-Service so they have a new look and feel similar to Requisition Self-Service.

LAWSON Overview of Requisition Self-Service

LAWSON Find / Shop Inquire Profile Welcome Chicago Clerk

Detail Profile Accounting User Profile

Requester: 4522-CH
Chicago Clerk

Order

Created Date

Requester Status

Reference Number

Requester Description

Company: 4522 Incentive Company

Requesting Location: 4522 Chicago Admin Office

Requested Delivery Date: 4522

Priority: Standard

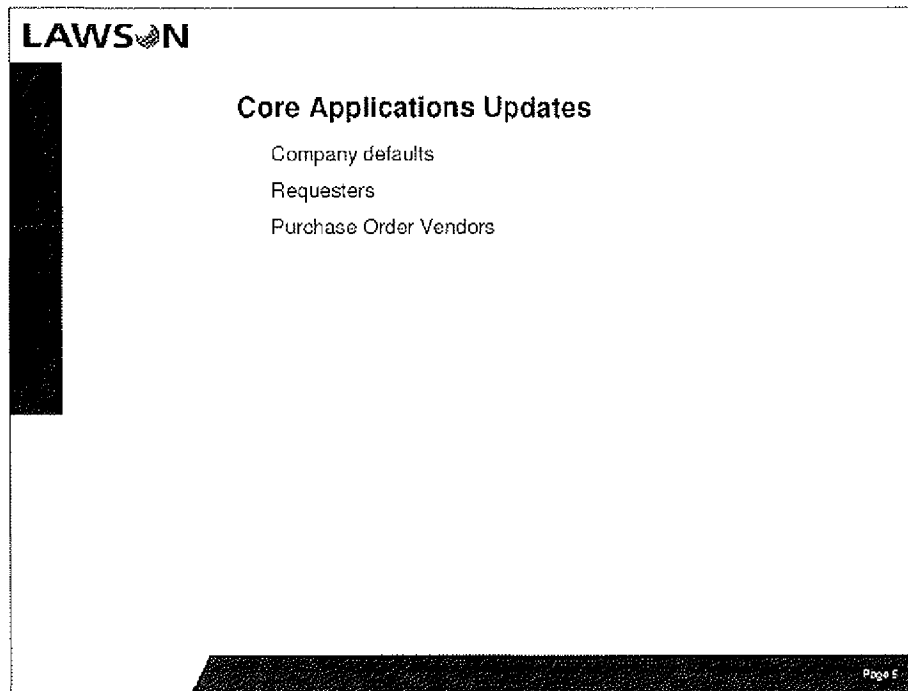
Deliver To

Item Description List

Please enter item description

Page 4

This is an example of what Requisition Self-Service looks like when you first access it. The tasks that are available for the user display on the top, such as shopping, inquiring on requisitions and profile information about the user. The requester information automatically defaults based on the procurement and webuser or user profile setup. Hot keys are available (in 8.1.0.53 and 9.0.4 versions) to eliminate a power user's need to pick up the mouse.



Within the core applications there is some initial setup that needs to be completed to utilize Requisition Self-Service. There are some Company-wide defaults, requester information and specific fields on the purchase order vendor that may be set.

LAWSON Inventory Company Parameters

Company (ICD1.1) ICD1.1

Company: 4001 Class Company
 Item Group: 4001 Hospital item group for class
 Costing Method: AVG Average Costing

Rules: Document No. Available Work Order Priority Levels User Fields Requisitions

Tasks Allowed

Order	Order
Catalog Search <input type="text"/>	Specials and Services <input type="text"/>
Shipping List <input type="text"/>	Punchout <input type="text"/>
Express Order <input type="text"/>	Categories <input type="text"/>

Item List specific field

List Only Contract Items No
 List Only Internal Items

Requisition Approval Type: IC12 Setup Using Approval Codes

Page 6

On the Inventory Control Company, you can set Company-wide parameters to determine which tasks you will allow your users to have. You need to select at least one task. If you have more than one task, you need to put them in a sequential order. So if you don't want to do Punchout, but you want to do all the other tasks, you would need to leave Punchout blank and only define 5 numbers (such as making Categories number 5), as long as they are in sequential order.

You also have the option to only list items that come from a vendor contract or inventory items. Inventory items would only display items that have an IC12 inventory record at the From Location based on the From Location on the requisition. If indicate that the user can only list IC12 records, the user will get an error if they pick a task and they don't have a From Location identified on the Requisition Header. (CTP-803-45078, 810-45079, 90-45080). If you indicate that you only want inventory items, you don't need the Specials and Service tasks since the items are not internal items, however Requisition Self-Service will still allows users to use Punchout, even though the items are brought into the requisition a special type items. If you allow the tasks and set the List Only Internal Items or Contract Items to yes, then the user would get an error when they try and access these tasks.

Inventory items will show with a ✓+ and non-inventory items will display as a ✓ when searching for items through the catalog. This is available in 8.03 through CPT 45853, 8.1 CTP 45854 and 9.0 CTP 45855 .

LAWSON Requesters Parameters

Requesters (RQ04.1) 11/08/2011 10:04 AM

Related Forms

Requester Name

Station Purchasing Classes Accounting Units Requisition Self-Service Requester Contact

--- Tasks Allowed ---

Order	Order
Catalog Search <input type="text"/>	Specials and Services <input type="text"/>
Shopping List <input type="text"/>	Punchout <input type="text"/>
Express Order <input type="text"/>	Categories <input type="text"/>

--- Item List Specific Fields ---

List only Contract Items Default To Company Level

List only Internal Items Default To Company Level

Allow Dropship ☒ Yes

Page 7

You have similar options on the requester. If you set the parameters at the requester, these would override the parameters on the IC Company. You also have the option on the requester to allow dropships. If you don't allow the requester to flag requisitions as drop ship (meaning the items would be delivered to a non-standard location and no receiving would be done), then the user won't see the dropship tab in Requisition Self-Service.

LAWSON PO Vendor Parameters

PO Vendor (PO10.1) [po10] [?] [?]

Vendor Group: ACME ACME VENDOR GROUP

Vendor: 10000 General Supplies (B4)

Cross Reference Vendor

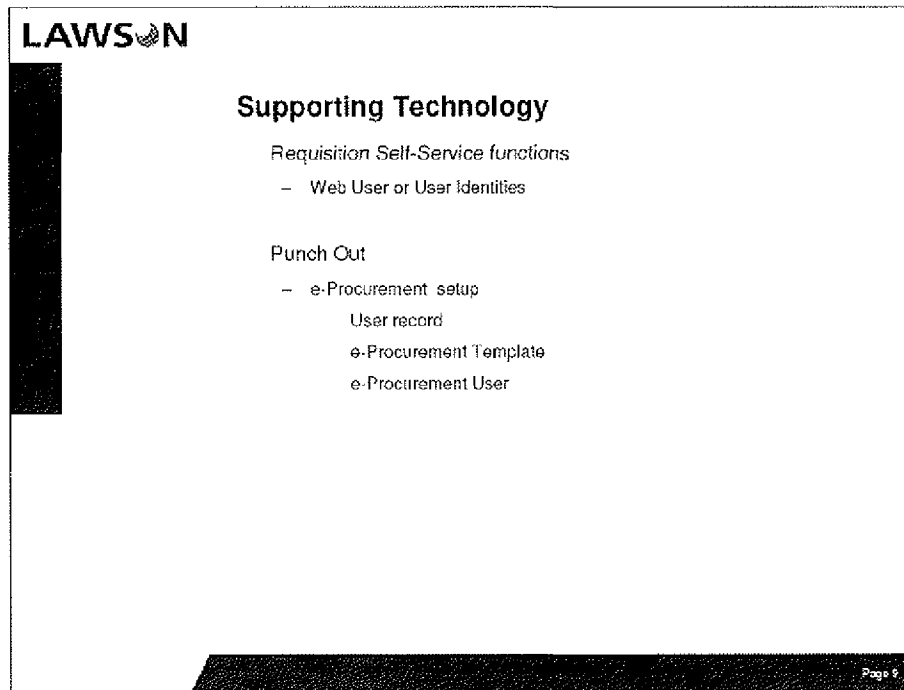
Main Shipping Limits, Tolerance Returns Punchout User Fields

Punchout Items on a Line

Allow Change to Punchout Line ☐ Yes

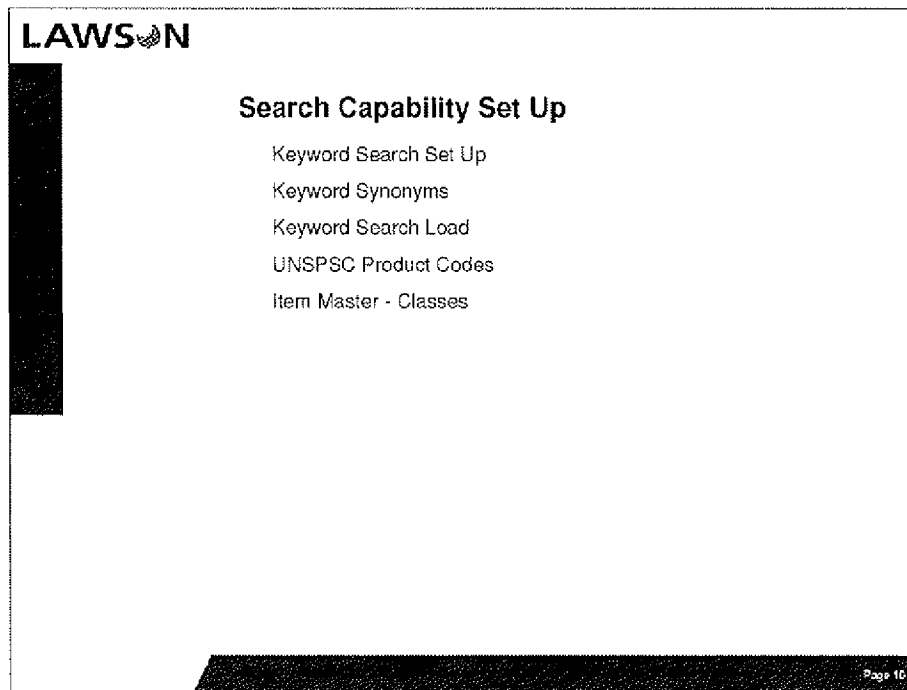
Page 6

On the Purchase Order Vendor you could set the flag to allow or not allow, changes to a Punchout line. If you set this to no, then you could not change any information once you pull the item in from the vendors website into a requisition. If you try to change any information, you would get an error. Dell Computers is a great example of why you may set this to no. They have specific tracking information tied to items and they hold this information for a specific time and will not except a Purchase Order if users have made any changes to the line.



For a user to utilize Requisition Self-Service to create requisitions, the user must be linked to a requester in the web user record (RD30-pre-90 technology & security) or within "Manage Identities" in the User Maintenance section within the Security Administrator (90). When the user logs into Requisition Self-Service, the requester information will then default in for the specific person.

To utilize Punchout, you must setup some supporting technology and additional e-procurement records. Such records include the user records and e-Procurement templates. These records allow Procurement Punchout to allow users to punch out to specific vendors. Access the Procurement Punchout Administration Guide for more information Punchout setup.



There is additional setup that can be done in the application to assist with search capabilities within Requisition Self-Service, such as keywords, UNSPSC codes and classes.

LAWSON Item Group Search Selections

Corporate Item Group (IC00.1) 1:00

Related Forms

Item Group Corp Item Group

Audit Item Master Activity ☐ Yes

Default Decimals on Cost Fields Default Decimals on Price Fields

Automatic Item Numbering

Numeric Item Number Search

Vendor Agreement Def Item Create Flag ☐ Assign

Last Item Number Load UOM User Fields

Commodity Structure

☐ BG Bcg

☐ BX Bcx

☐ LZ Lase

☐ EA Eac

☐ PP Per

☐ RH Rch

Page 11

Within the Item Group, you can access the search button which allows you to determine link keyword fields related to the item, that you can search on. Since this is setup on the Item Group, the key words searches that are available are applicable to all Companies attached to this Item Group.

LAWS **Keyword Search Setup**

Keyword Search Setup (IC00.5)

Item Group: 1001

<input checked="" type="checkbox"/>	Item	<input checked="" type="checkbox"/>	Used
<input checked="" type="checkbox"/>	Description	<input checked="" type="checkbox"/>	Used
<input checked="" type="checkbox"/>	2nd Description	<input checked="" type="checkbox"/>	Used
<input type="checkbox"/>	Manufacturer Item	<input type="checkbox"/>	Not Used
<input type="checkbox"/>	Purchasing Class	<input type="checkbox"/>	Not Used
<input type="checkbox"/>	Inventory Class	<input type="checkbox"/>	Not Used
<input type="checkbox"/>	Sales Class	<input type="checkbox"/>	Not Used
<input type="checkbox"/>	Generic Name	<input type="checkbox"/>	Not Used
<input checked="" type="checkbox"/>	First Alpha User Field	<input checked="" type="checkbox"/>	Used
<input type="checkbox"/>	Second Alpha User Field	<input type="checkbox"/>	Not Used
<input type="checkbox"/>	Third Alpha User Field	<input type="checkbox"/>	Not Used
<input type="checkbox"/>	Fourth Alpha User Field	<input type="checkbox"/>	Not Used
<input type="checkbox"/>	Fifth Alpha User Field	<input type="checkbox"/>	Not Used
<input type="checkbox"/>	First Numeric User Field	<input type="checkbox"/>	Not Used

Page 12

In the Keyword Search Setup (IC00.5), you can decide on which keyword origins to use. For example, I have set this up to use the item number, description (field 1), 2nd description field and First Alpha User Field. You can use page down to see additional fields. There are 29 fields you can setup as keyword fields to search for items within Requisition Self-Service. Fields come from the Item Master (IC11) and Vendor Item (PO13) records.

LAWSON Keyword Search Load

Keyword Search Load (IC800)

Submit Reports Job Sched Print Page

Job Name

Job Description

User Name R001 R001 User

Data Area/ID NOR00

Parameters

Item Group

Keyword Origin

Description

2nd Description

Manufacturing Item

Purchasing Class

Inventory Class

Taxes Class

Generic Name

Page 15

After you determine which keywords you want to use in the Item Group (IC00), you need to run the Keyword Search Load (IC800) for all of the Keyword origins that you selected. This will load keywords for items that already exists and future additional items. The Keyword Search Load (IC800) usually only needs to be done once (per each keyword origin), unless you add more keywords in your Item Group (IC00.1). Then you need to run this for any new keywords that you have added.

LAWSON Keyword Synonyms

Keyword Synonym (IC32.1)

Keyword WHITE

Usage Count

<input type="checkbox"/>	IVORY
<input type="checkbox"/>	BEIGE
<input type="checkbox"/>	ECRU
<input type="checkbox"/>	OFF-WHITE
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Page 16

Once you have created keywords, you can create synonyms for the keywords. So if your looking for white towels and someone searches for ivory towels, they can still find the item. Synonyms could be used for items with common misspellings or common abbreviations. For example is someone abbreviates gloves as GLV they could still find the item if you spelled the word gloves out (g-l-o-v-e-s) or searched by GLV.

LAWSON **UNSPSC Product Codes**

UNSPSC Product Codes (IC16.1)

~ + / - J ? > |

Item Group CGI Corp Item Group

Segment

Family

Class

Commodity

Description Level 4 Commodity

Description Staples

Short Description Staples

Status Y Code is used for an item

Page 16

Requisition Self-Service also allows you to search on categories based on UNSPSC Product Codes. UNSPSC stands for United Nations Standard Products and Services or Universal Standard Products and Services Classifications which provide designated categories for items. UNSPSC codes were developed by the United Nations in association with Dunn & Bradstreet. It has four levels; segment, family, class and commodity.

UNSPSC codes can be added in IC16 or can also be loaded using IC516. Once you have added the codes (either manually or uploaded), you then need to add them to items.

LAWSON Item Master Parameters

Item Master (IC11.1)

Item Group: C01 Corp Item Group

Item: 8525

STANDARD

Add Comments

Main | Classes | Users | Packing | Accounts | User Fields

Freight Class: []

Sales Class: []

Inventory Class: []

Purchasing Class: []

ICN Code: []

Hazard Code: []

Purchase Taxable: [] Default: To Next Level

Purchase Tax Code: []

Product Tax Category: []

Item Code

Segment	Family	Class	Commodity
[]	[]	[]	[]

Stepless

Page 16

UNSPSC Codes can be added in the Classes tab under the Item Code within the Item Master (IC00.1). You must add all four codes to an item. Each code is a 2 digits. If you create your own hierarchy, then later decide to use UNSPSC codes, you would need to clean-up the old codes. Basically remove them from items and then delete the codes as the system will not override what you have previously entered with the new codes that you download. You could use Microsoft Add-ins as well to load this information.

If you set up inventory classes or purchasing classes as keywords, you can also identify them in the Item Master and they would be available to search on as well to find items.

The screenshot displays a software interface with the 'LAWSON' logo in the top left corner. A vertical black bar is positioned to the left of the main content area. The main content area features the heading 'Test Your Knowledge – Overview/Setup' followed by the instruction 'Click on the button to access a quiz about Requisition Self-Service Overview & Setup'. Below this text is a rectangular button with the text 'QUIZ – Requisition Self-Service Overview/Setup'. A thick black horizontal bar at the bottom of the interface contains the text 'Page 17' on the right side.

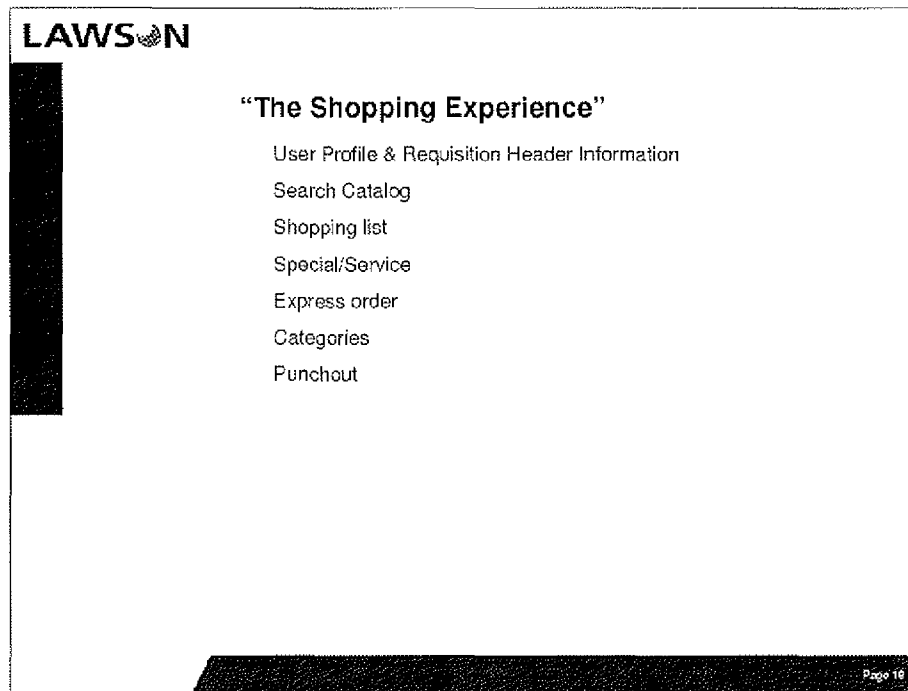
LAWSON

Test Your Knowledge – Overview/Setup

Click on the button to access a quiz about Requisition Self-Service Overview & Setup

**QUIZ –
Requisition Self-Service
Overview/Setup**

Page 17



Once you have completed the setup, you can now shop for items. The Requisition Self-Service shopping experience includes user profile and requisition header information and shopping. Shopping can include searching for items through your internal catalog (or the item master), shopping via shopping lists, which comes from Procurement Templates, ordering items not in your item master (specials) or services, quick entry or finding item using express order, shopping via UNSPSC categories and/or punching out to the vendor's catalog to find items.

When you enter Requisition Self-Service your requester and requester information (From Company, Requesting Location, etc) populates based on the requester added to your Web User record (RD30) or user profile record.

On the Basic tab, you can change the requesting company (in the newest version), identify delivery dates, priority and specific deliver to information if wanted.

The Company select field makes it easier to do intra-Company requisitioning. This enhancement requires you set the Company select value =true in the rss_config.xml file. Then you'll be able to change the Company as well as the Requesting Location in the Profile, from the values that default when you log in on a requisition by requisition basis. Once a requisition number is assigned the Company can't be changed. When you change the Company it clears the Requesting Location on the Basic Profile and the From Company, From Location and Accounting information on the Detail Profile. When you select a task and begin shopping the From Location and From Company tied to that Requesting Location will default to the Profile (as well as accounting information). If it's not fully set up in RQ01 to default you may have to manually populate some of these fields.

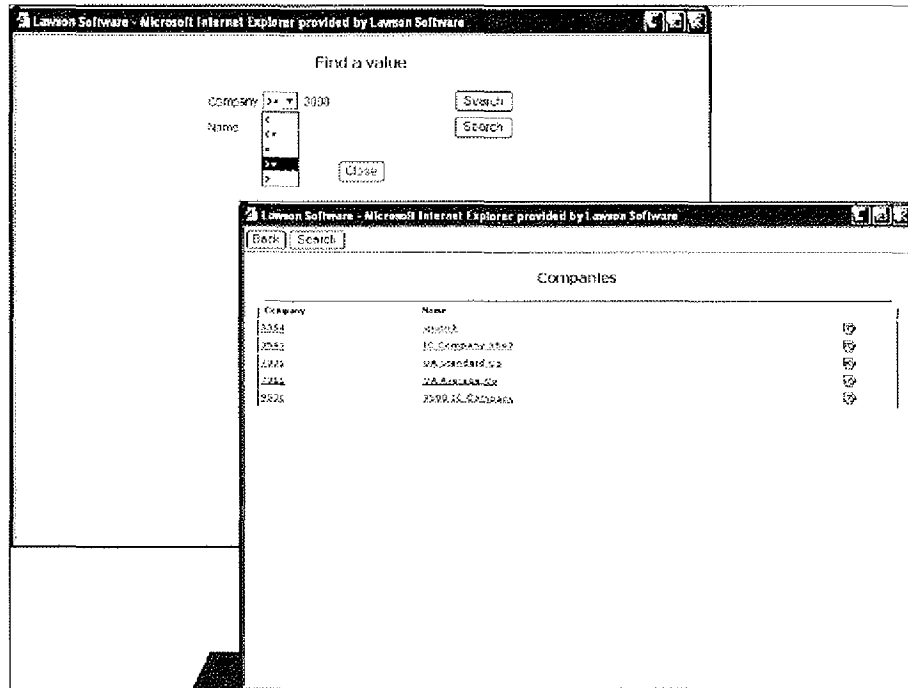
The **NEW** button starts a new requisition from where you are. So if lines aren't saved from a previous shopping experience or if the cart is empty, the requisition header will be deleted a new requisition is created on the next task selection. The New button is like the refresh button in previous versions on Requisition Self-Service in that it will clear cookies, etc.

Clear clears items from cart, however the current header remains.

Print launches a new window for print preview. The requisition can be sent to default desktop printer (or network printer) from there.

Save saves lines to database. A change on line detail does not update the database until they are Saved.

Checkout saves items to database, empties cart, and releases requisition.



You can use the Detail Profile tab to identify the Cost Default Vendor, currency, buyer and tax information. If you select a field that is a fairly large table, such as vendors, you can use the filter or find capabilities to narrow your search.

LAWS Find / Shop Inquire Profile Welcome Mikego Clerk ?

Basic Accounting User Fields

From Company: 4522 - Instructor Company

From Location: 015445 Chicago Warehouse

Cost Default Vendor:

Purchase From:

Currency Code:

Buyer:

Taxable:

Tax Code:

Order Required:

Item	Quantity	Cost
There are no items in this list.		

Total Quantity: 0
Total Cost: \$0
Number of Cost Lines: 0

Done Print

You can use the Detail Profile tab to identify the Cost Default Vendor, currency, buyer and tax information. If you select a field that is a fairly large table, such as vendors, you can use the filter or find capabilities to narrow your search.

LAWSON

Back Search

Active Vendors By Name

Name	Number	City
COMPUTER WORLD	1003	St Paul
DESK MATES	1001	St Paul
ELSHIMMUS, RASH	1006	Chicago
MARATHON, JESSICA	1002	Chicago
PACIFICORP PLUS	1004	Minneapolis
WOMEN'S NATIONAL PRESSURE WASH	1004	Atlanta
UPS	1008	St Paul
WARDWICK, COFFEE	1009	Minneapolis

Find a value

Name Search

Business Search

City Search

State Search

Postal Code Search

Has Locations Search

Close

Active Vendors By Name

Name	Number	City	St/Prov	Postal Code	Has Locations
COMPUTER WORLD	1003	St Paul	MI	55102	5
DESK MATES	1001	St Paul	MI	55102	5
UPS	1008	St Paul	MI	55102	5

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If you select SEARCH, you can then identify a value to search for a record. In this example I am searching for all vendors within a specific postal code.

LAWSON Finding Records (Cont.)

Lawson Software - Microsoft Internet Explorer provided by Lawson Software

Find a value

Number: 1

Name:

City:

State/Province:

Postal Code:

Back Search

Active Vendors By Number

Number	Name	City	State/Province	Postal Code	
1	Boothman, Robert	New York	NY	11250	
10	Booth	New York	NY	11250	
11	Booth	New York	NY	11250	
12	Booth	New York	NY	11250	
13	Booth	New York	NY	11250	
14	Booth	New York	NY	11250	
15	Booth	New York	NY	11250	
16	Booth	New York	NY	11250	
17	Booth	New York	NY	11250	
18	Booth	New York	NY	11250	
19	Booth	New York	NY	11250	
20	Booth	New York	NY	11250	

When search for an alpha right field (which acts like a numeric field, such as vendor number), it brings up any records that have that numeric value in the field you are searching in. So the number 1 brought up record 1, 10 51, etc.

LAWSON Find / Shop **Shopping List** **Profile** **Welcome Chicago Clerk**

Search Catalog
Shopping List
By Express Order
Special / Service
Purchase Order

Requester 4522 CHS Categories
Chicago Clerk

Order
Creation Date
Requisition Status

Reference Number
Requisition Description

Company 4522 Instructor Company

Requesting Location CHADM Chicago Admin Office

Requested Delivery Date 10/10/2011

Priority Normal

Deliver To

Shopping List

Item	Quantity	Cost
There are no items in your cart.		

Total Quantity: 0
Total Cost: \$0.00
Number of Cart Items: 0

Back Home

If your header information is set to default, simply selecting a task from Find / Shop starts creating an order. You won't be able to add lines to your requisition until you have a Requesting Location and From Location populated in your Profile. You also won't be able to select a vendor or buyer, but you can key this data in the field if you know the values you want to use.

Once you select a task, a requisition number (or requisition header) is created.

The screenshot displays the 'User Analysis' section of the Lawson Self-Service application. The top navigation bar includes links for 'Find / Shop', 'Inquire', 'Profile', and 'Welcome'. Below this, a secondary menu shows 'Basic', 'Detail Profile', 'Drop Ship', 'Accounting', and 'User Fields'. The main content area features a 'Comment Code' field with a dropdown arrow, followed by a list of radio button options for where comments can be printed: Internal Documents, Requisitions, Purchase Orders, PO as Trailer Comments, Pick Lists, Receiving Documents, Regulation Header Display Only Comments, Address Comments, Delivery Tickets, and Attach a URL to the Requisition. A 'View URL' button is next to the last option. Below the list is the URL 'http://www.lawson.com'. On the right side, there is a summary box titled 'Drop Ship Summary' containing a table with columns 'Item', 'Quantity', and 'Cost'. The table lists one item: '000006 cnc 19 speeds dark roost' with a quantity of 10,0000 and a cost of 10,0000. At the bottom of this box, it shows 'Total Quantity: 10,0000' and 'Total Cost: \$100,0000'. The number of cart items is shown as 1. At the very bottom, there are buttons for 'New', 'Clear', 'Print', 'Save', and 'Check-out'.

LAWSON

Find / Shop Inquire Profile Welcome

User Analysis

Basic Detail Profile Drop Ship Accounting User Fields

User Analysis

Comment Code

☐ Comments to Print on Headers of Internal Documents
☐ Comments to Print on Requisitions
☐ Comments to Print on Purchase Orders
☐ Comments to Print on a PO as Trailer Comments
☒ Comments to Print on Pick Lists
☐ Comments to Print on Receiving Documents
☐ Regulation Header Display Only Comments
☐ Bill to Address Comments
☐ Comments to Print on Delivery Tickets
☐ Attach a URL to the Requisition View URL

http://www.lawson.com

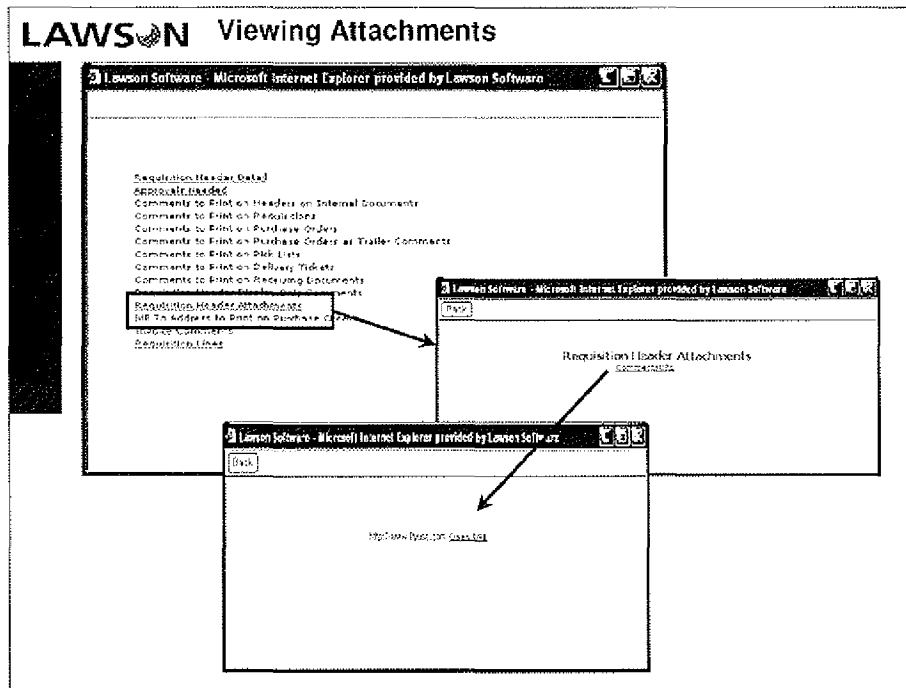
Drop Ship Summary

Item	Quantity	Cost
000006 cnc 19 speeds dark roost	10,0000	10,0000

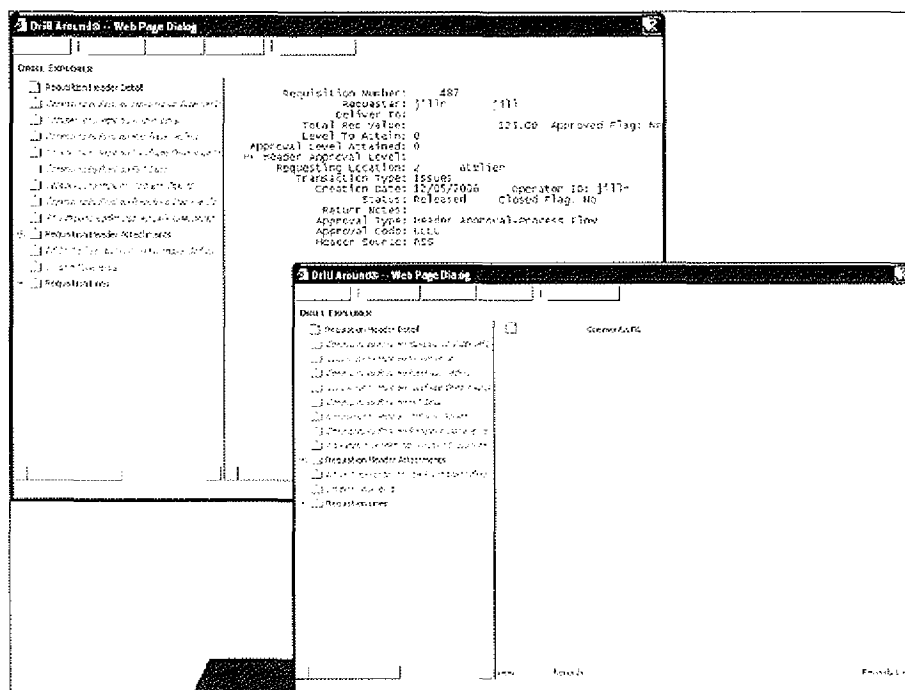
Total Quantity: 10,0000
 Total Cost: \$100,0000
 Number of Cart Items: 1

New Clear Print Save Check-out

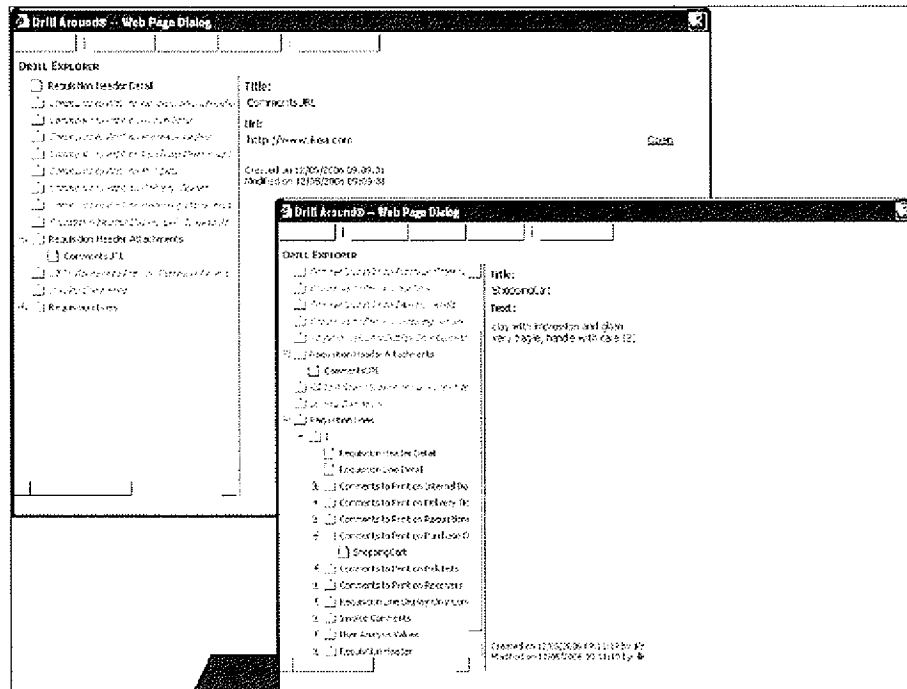
Once a requisition number is created, you have the ability to attach a URL to the header or add comments. Both are done through the comments tab. From the Profile here's where you add the comment (once a requisition has been assigned).



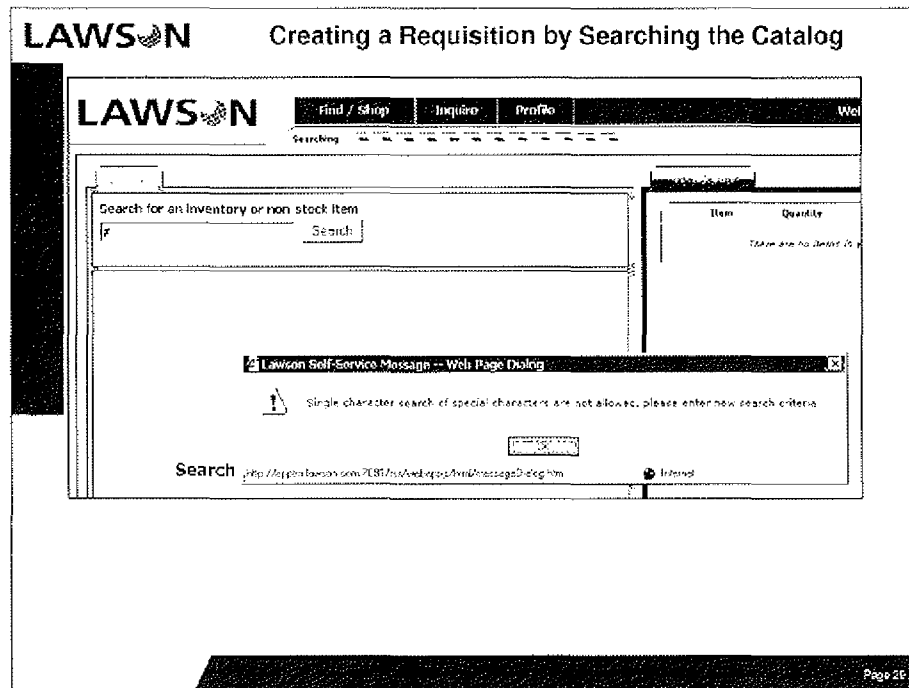
The inquiry for comments and urls looks like this.



The attachments are also available on Requisition Header drills. So it is available on drill when doing approvals, etc.



This is how the comments and/or url displays on drills.



When using the Search Catalog task, you enter the value you want to look for in the search field. As soon as you type in the third letter the system begins searching for matching 'keywords' and displays the results as a dropdown list. Keywords exist because you enable certain fields as 'searchable' in IC00.5 and run IC800 to build keywords from these fields. These fields come from fields in the files ITEMMAST (IC11) ITEMLOC (IC12) and/or POVENITEM (PO13).

You cannot search search on special characters alone. If you try to do this you will get an error message.

LAWSON Searching for items

LAWSON Find / Shop Inquire Profile

Order: 1

Search for an inventory or non-stock item

pen
PEN
PENCL
PENCL5

Search

Search for an inventory or non-stock item

pen

Search

Add All Add Selected

☒ Nonstock item at your From Location ☒ Stock item at your From Location

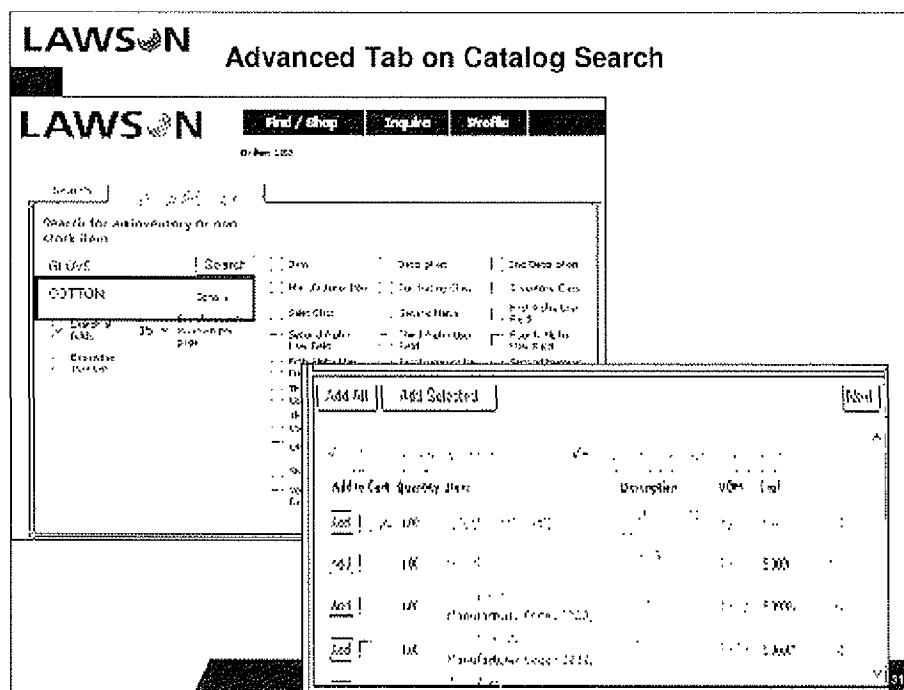
Add to Cart	Quantity	Item	Description	UOM	Cost
Add <input type="checkbox"/>	✓ 4	45215	PEN, BLACK BALL POINT	BX	2.50000 USD
Add <input type="checkbox"/>	✓ 4	45215	PENCILS, LEAD #2	BX	1.50000 USD
Add <input type="checkbox"/>	✓ 4	45222	PAPER, COPIER	BM	5.75000 USD
Add <input type="checkbox"/>	✓ 4	45222	STAPLER	SB	10.00000 USD
Add <input type="checkbox"/>	✓ 4	45222	STAPLES	SS	3.00000 USD

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After 3 letters, the system will start looking for matching keywords and display the results as a dropdown list. If the requester highlights one of those keywords in the list of results and hit enter or click 'search' again it kicks off a more precise search on the selected keyword, getting them closer to the desired result.

Keywords exist because you enable 'searchable' fields in IC00.5. These fields come from ITEMMAST (IC11) ITEMLOC (IC12) and/or POVENITEM (PO13) fields. Then you'll run IC800 which builds the keywords from the fields enabled in IC00.5. Once you've taken these initial steps keywords are built dynamically as items are added to IC11, IC12 etc.

You can also search for items by inventory class, manufacturer number, or whatever fields you identified as keyword fields.



Through the rss_configuration file, you can display the Advanced search tab which gives you specific options on how you want to search. Keep in mind, the regular search feature STILL searches by ALL available keywords or origins you defined. So anytime you search, the system will try and find matches based on ALL the keywords or origins you said you could search by. The only thing that the advanced search can do is to ignore specific records. So if you were looking for gloves and you didn't want cotton gloves, the system would only bring back records that did not contain cotton in the record.

LAWSON Searching for Items with Synonyms

Search for an inventory or non-stock item
 BEIGE

Add All Add Selected

✓ = Nonstock item at your From Location ✓+ = Stock item at your From Location

Add to Cart	Quantity	Item	Description	UOM	Cost
<input type="button" value="Add"/>		4524	WHITE WINDOW ENVELOPE	EX	3.000000 USD
<input type="button" value="Add"/>	10000	4525	WHITE PAPER	EX	0.000000 USD
<input type="button" value="Add"/>	10000	4526	BEIGE STAPLER	EA	0.000000 USD

Search for an inventory or non-stock item
 (BEIGE STAPLER)

Add All Add Selected

✓ = Nonstock item at your From Location ✓+ = Stock item at your From Location

Add to Cart	Quantity	Item	Description	UOM	Cost
<input type="button" value="Add"/>	10000	4526	BEIGE STAPLER	EA	0.000000 USD

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You can also search for things that you may have setup as synonyms. For example, I took the keyword beige which already has synonyms assigned and then used Item Search. My results show any items that have the keyword or the synonym in the word. Type in a word with a synonym and find like words. If we type in the full description and search, a single item is found. However, I could have type in white stapler and the beige stapler would have shown as an option for me to select.

LE02932717

LAWSON Additional Item Information

Requisition Self Service - Microsoft Internet Explorer provided by Lawson Software

LAWSON Find / Stop Inquire Profile Welcome ?

Order: 402

Search for an Inventory or Non-stock Item

100295

☒ Non-stock item at your From Location ☐ Stock item at your From Location

Item	Quantity	Item	Description	Item	Cost
100295	1	100295	ULT 100295 CVC 10 YTD 04 CHETA	63	0.0000 USD

Source Vendor:
10 Name

Vendor Location:
10 Name

City State Country

Cost:
Cost Breakdown:
Manufacturer: 6042 6102A

Vendor Item:
Cost Source:
Cost Option: Cost Required

Item	Quantity	Cost
Please enter quantities or prices.		

Total Quantity: 0
Total Cost: \$0
Number of Cost Lines: 0

If you get multiple search results, you can click on the item number and see additional information about the item. This is a non-inventory item, but if it was an inventory item, you could also see Stock on Hand and Available Stock on Hand.

LAWSON Line Specific Details

Requisition Self-Service - Microsoft Internet Explorer provided by Lawson Software

LAWSON Find / Stop Inquire Profile Welcome ?

06/08/11

Line Detail Line Accounting Line User Fields

Line Item Analysis Line Discounts

Change

Quantity	Item	Description	UOM	Cost	Currency	Status
1	100150	INDUST QUINCK 20000 SH CAY 20/02/10 EA	EA	100.000	USD	Unreleased

Item Type: Nonstock

Item Entry Code: Item

Major Purchase Class: 4100

Minor Purchase Class: 2000

Manufacturer Code: ED

Manufacturer Division:

Manufacturer Number: 405101

Vendor Item: 100150

Use Entrance Cost: Yes

Cost Method: Cost Required

Conversion Rate: 1.00000

Commodity Code:

Item	Quantity	Cost
100150	1	100.0000
100150	1	100.0000
101233	1	5.0000
101233	1	52.0000
100150	1	5.0000
100150	1	4.0000

Total Quantity: 5
Total Cost: 256.0000
Number of Cost Items: 5

New Cancel Print Save Cancel

The search results are displayed including any specific details such as manufacturing information, vendor items, and other specifics (SKU, UPC, UPN, UPN1, NDC, or Vendor Items).

LAWSON Adding Items to the Shopping Cart

Search for an inventory or non-stock item

✓ = Nonstock item at your From Location ✓+ = Stock item

Add to Cart	Quantity	Item	Description	UOM	Cost	Unit
<input type="button" value="Add"/>	✓+ <input type="text" value="1.0000"/>	4510	PEN, BLACK BALLPOINT	BX	2.50000	USD
<input type="button" value="Add"/>	✓+ <input type="text" value="1.0000"/>	4515	PENCILS, LEAD #2	BX	1.50000	USD
<input type="button" value="Add"/>	✓+ <input type="text" value="1.0000"/>	4520	PAPER, COPIER	RM	5.75000	USD
<input type="button" value="Add"/>	✓+ <input type="text" value="1.0000"/>	4525	STAPLER	EA	10.00000	USD
<input type="button" value="Add"/>	✓+ <input type="text" value="1.0000"/>	4530	STAPLES	BX	3.00000	USD

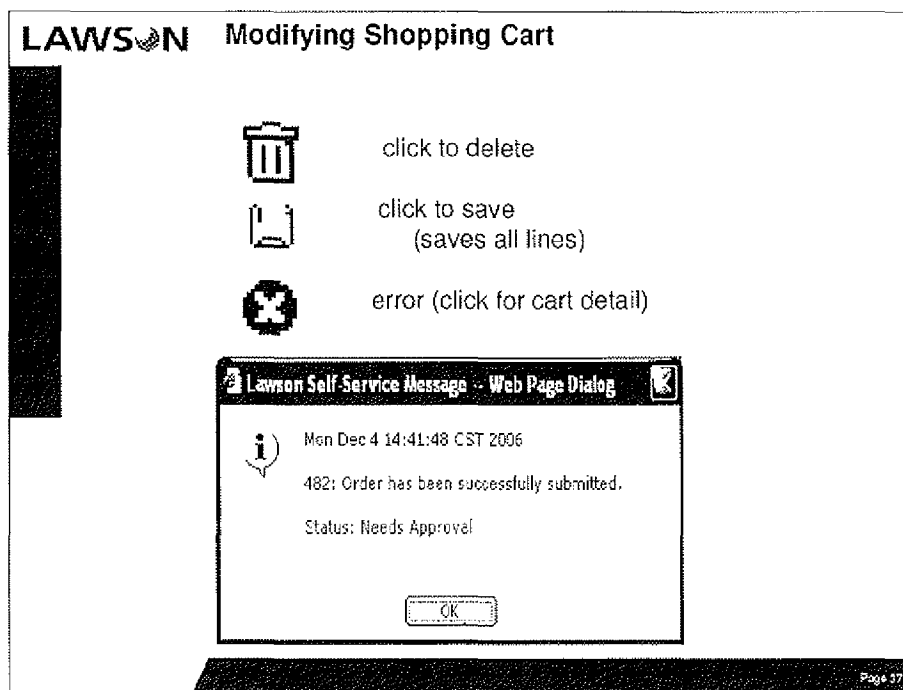
Unit of Measure Conversion

There is	EA	per	EA
1.00000	EA	per	EA
10.00000	EA	per	BX
30.00000	EA	per	CT

Internet

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Once you have the list of items you can adjust the quantity, which defaults to one and you can change the UOM and/or view valid UOM's for the item. If the item does not have cost information, the cost field will be enterable, so you can enter a cost in for the item as well. You can then select the items to add to the cart by using the "Add All" or selecting specific items and using the "ADD" or "Add Selected" function as well.

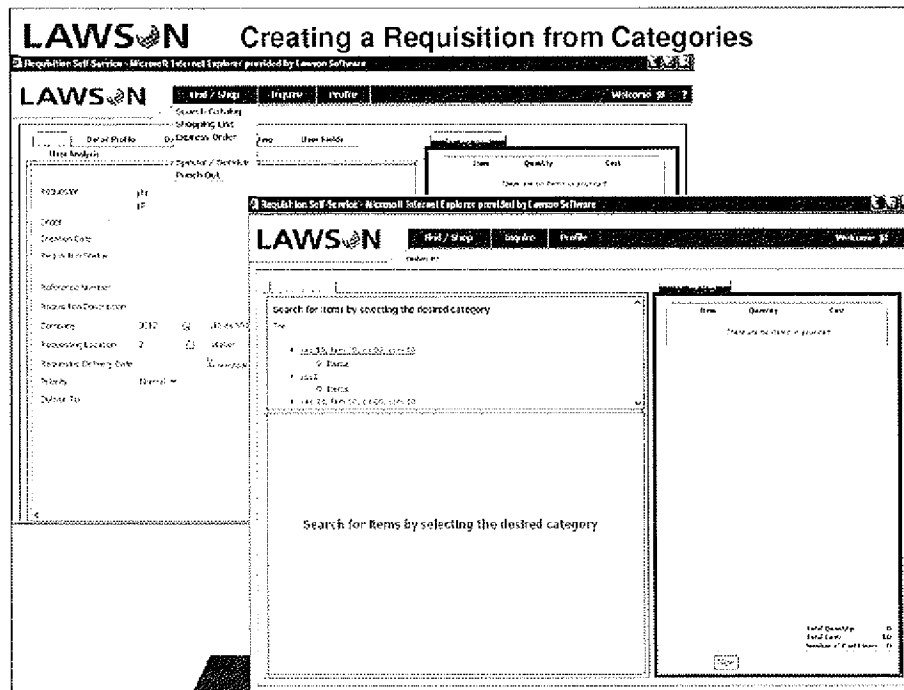


Once items have been moved to the cart you have the ability to modify the lines. If you make a change to the line you need to click the change button, then either do a save draft or check out. You can also delete an item from the cart or view errors.

You can mouse over the cart items to see the specific error message for the line.

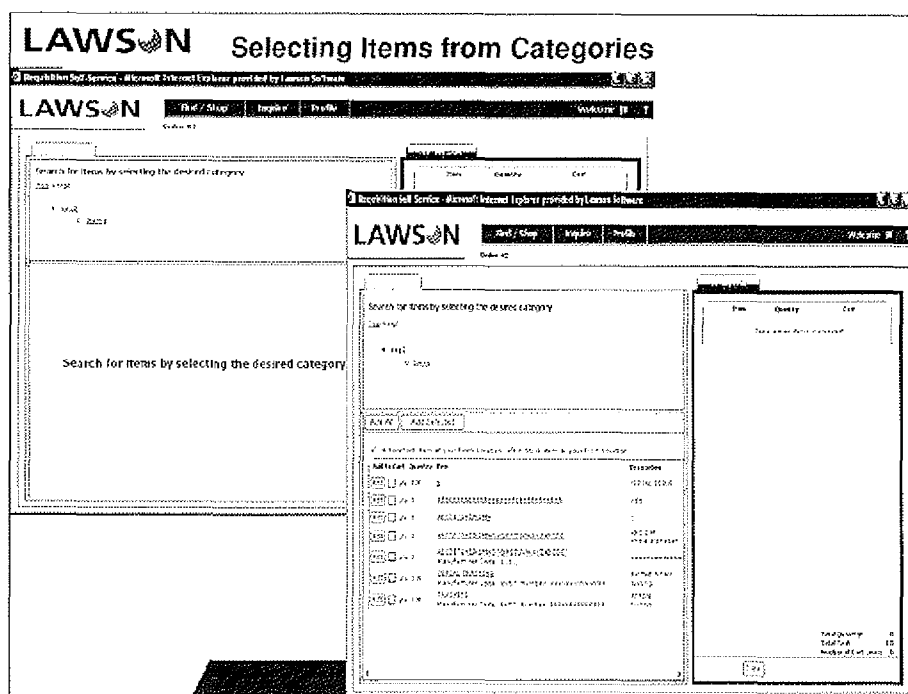
Correct the errors, then save or check out. If you haven't saved your lines first, the application will save them as it checks you out. When you see the message below, you've successfully created a requisition!

You could also use the Save function to save the requisition, but not release it. The checkout function releases the requisition.



Another way you can find items are by Categories. Categories represent UNSPSC codes and can be defined on IC16.1 or imported using IC516.1.

The top level categories will be displayed. Select a category you want to search within.



You can click on the category hyperlinks to move backwards or forwards in your search, so either broadening your search or narrowing your search. You can use the add, add all or add selected functions to add items to the cart. Once items have been moved to the cart you have the ability to modify the lines. If you make a change to the line you need to click the change button, then either do a save draft or check out.

LAWSON Creating a Requisition form a Shopping List

Requisition Self-Service - Microsoft Internet Explorer provided by Lawson Software

LAWSON Find / Shop Inquire Profile Welcome jll ?

Search Catalog Express Order Categories Special / Service Punch Out

15 Shopping List lines to display per page Expanded Item List

Search

Company Shopping List Location Shopping List Requester Shopping List

Shopping List Name

4522-OFFICE SUPPLIES	Office Supplies Proc Template
APPENDIX CASE	Supplies - Appendix procedure
CD - BETA GAME	Supplies for CD beta Game

0 50 NUMBER OF COPIES 0

Now

A Shopping List is a list of frequently ordered items. Before you use a Shopping List to create requisitions you must create a Shopping List in Shopping List Maintenance (covered later in this presentation) or set one up on Templates (PO15). A Shopping List (Template) must have at least one participant; you must be one of the participants to use the shopping list. Mouse over on the Find/Shop, when the drop down appears click on Shopping List. There are three different types of shopping lists that may be available to a user: Company, which has a Company as a participant, thus anyone associated with this company (based on the users Requesting location, etc), may use this shopping list; Location, which as a specific location as a participant, thus anyone associated with this location (based on the users Requesting location, etc.) may use this shopping list; and Requester which has the specific requester as a participant, so only the Requester can use this template. Once you select either the Company, Location or Requester Shopping List, you will see the application listings.

LAWSON Selecting Items from Shopping Lists

Search

☐ Shopping list lines to display per page
☐ Expanded Item List

Company Shopping List
 Local Shopping List
 Computer Shopping List

Add All Add Selected Search

Shopping List Name
 4522-OFFICE SUPPLIES Office Supplies from Template

Add to Cart	Quantity	Item	Description	UOM	Cost
Add <input type="checkbox"/>	<input type="checkbox"/>	4522	PAPER, COPIER	EA	5.75000 USD
Add <input type="checkbox"/>	<input type="checkbox"/>	4522	TONER CARTRIDGE, HP	EA	15.00000 USD
Add <input type="checkbox"/>	<input type="checkbox"/>	4522	STAPLES	EA	0.00000 USD
Add <input type="checkbox"/>	<input type="checkbox"/>	4522	PEN, BLACK BALLPOINT	EA	2.50000 USD
Add <input type="checkbox"/>	<input type="checkbox"/>	4522	PENCILS, LEAD #2	EA	1.50000 USD
Add <input type="checkbox"/>	<input type="checkbox"/>	4522	HIGHLIGHTERS	EA	0.75000 USD
Add <input type="checkbox"/>	<input type="checkbox"/>	4522	POST-IT	EA	0.75000 USD

Search

☐ Shopping list lines to display per page
☐ Expanded Item List

Company Shopping List
 Local Shopping List
 Computer Shopping List

Back to Shopping List Search

4522-OFFICE SUPPLIES Shopping list items matching search criteria "pen"

Item	Description	UOM
4522	PEN, BLACK BALLPOINT	EA
4522	PENCILS, LEAD #2	EA

Once you select a Shopping List from which to create a requisition, the lines appear on the page. If you see the items you want while viewing the shopping list lines, you can add them to the cart. You can add items one by one by simply clicking the Add button, "Select All" – will move all line items in the window to the cart and "Add Selected" will move only the item you check.

The Search field allows you to search within a Shopping List for an item. Enter a string of characters into the search box and the system returns results containing that string of characters. For example if you search on 'non', any item that contains the string 'non' will be returned: non stock, nonstock, or anonymous would appear Or in this case pen would display pens and pencils.

When you click on an item in the search results you're returned to the item on the template line. You'll see the item displayed in the order it holds on the template. You can then select items and add them to the requisition.

LAWSON Creating a Requisition for a Special Item

LAWSON Find / Shop Inquiry Profile

Search Catalog
Shopping List
Express Order

Categories
Punch Out

Item: Special

Description: Special

UOM: Special

Quantity: 1

Unit Price: 2.00

Subtotal: 2.00

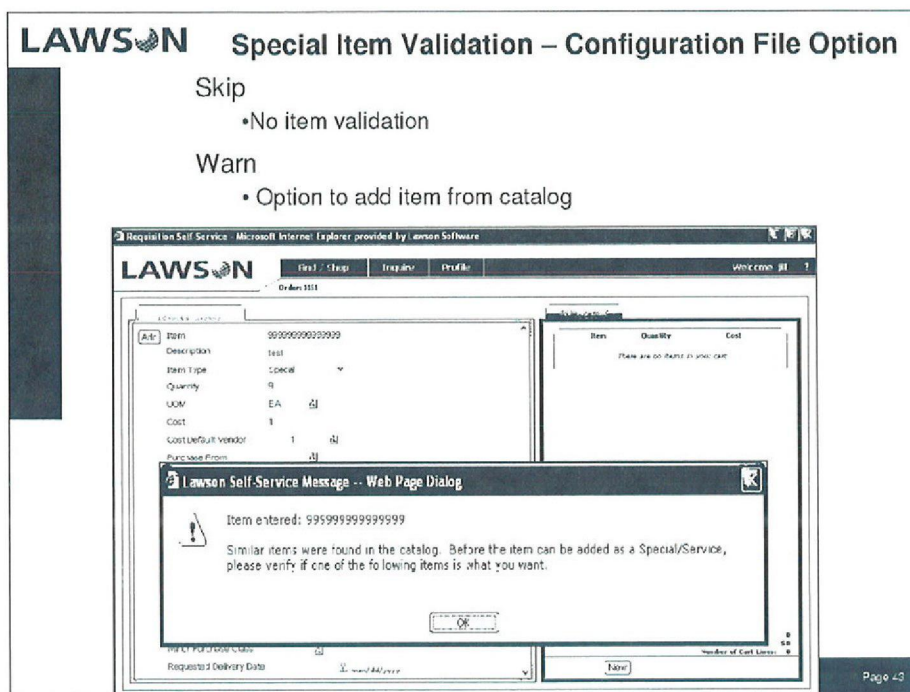
Grand Total: 2.00

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Option in the configuration file to change background color for required fields

Mouse over Find/Shop on the menu bar, when the drop down list appears click Special/Service. To add a Special or Service type item to an order you'll need to enter an item, description, UOM, quantity, etc. If you don't enter a quantity, it will default to 1 but remember, there are required fields and if they aren't populated the system will provide as message. For example, "Field is required – UOM". We also have new options in the configuration file that allow you to indicate which fields are required by changing the background color like shown in yellow.

When you've entered the necessary information, click "Add" to move the item to the cart. Once items are in the cart you can bring up line item details and modify the information if necessary.



There are special item validation options in the configuration file that will work with specials and service. These are global settings that affect all users; the options are Skip and Warn.

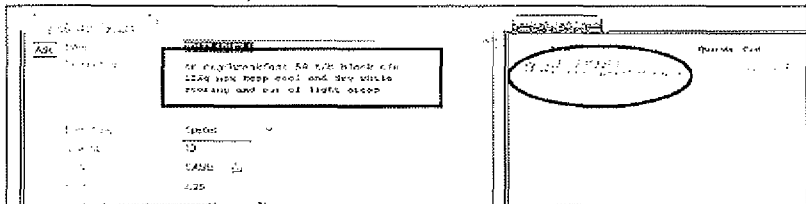
Skip means there is no item validation against Lawson items (this is the delivered configuration and the way the application worked in the past.)

Warn means you will be asked if they want to transfer to the item catalog to find and add the item to the Requisitions. The system will then show you like or similar matches. You can then select an item from the item catalog or go back to specials and services and add the item.

LAWSON Special Item – Descriptions Options

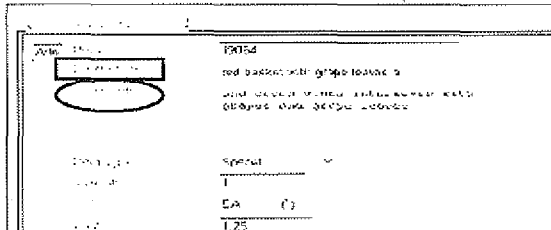
Auto

- 1st 30 characters show description
- Enter description become a line comment



Explicit

- Limits description to 30 characters
- Additional comment box is provided



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You can also determine how to handle item descriptions within the configuration file. There are three options to control the length of item descriptions which will globally affect the way the field or fields appears. The settings choices are auto, explicit and none.

Auto is the default setting we deliver. If the entered description exceeds 30 characters, then the first 30 characters will be seen as the description, and the entire (30 character +) description becomes a line comment (attachment) which can be viewed by drilling just like any other comment attached to a requisition or PO line.

Explicit limits the description field to 30 characters and an additional comment box is provided

LAWSON Special Item Descriptions (Cont.)

None
 — Description limited to 30 characters

Line Basic	Line Detail	Line Accounting	Line User Fields
Line User Analysis			

Change

Quantity	Item	Description	UNIT	U.O.	LIBRARY	STATUS
1.000	2102321202	Workstation Volder 1. Workstation	EA	100.00	100.00	Released

Comment Code

- ☐ Comments to Print on Internal Documents
- ☐ Comments to Print on Delivery Tickets
- ☐ Comments to Print on Requisitions
- ☐ Comments to Print on Purchase Orders
- ☐ Comments to Print on Pick Lists
- ☐ Comments to Print on Receiving Documents
- ☐ Result on Line Display Only Comments

20 245" x 12 1/2" x 60 9/16"
 Style # 11850

None limits the description to 30 characters and there is no comment box provided. To add a comment the user would need to bring up the line item detail and enter a comment as with other item types.

LAWSON Creating a Requisition using Express Order

LAWSON Find / Shop Inquire Profile

Search Catalog
Shopping List

Special / Service
Categories
Punch Out

Add a known item number to

Item: S5001 Find Add

Description: PENCILS, #2

Quantity: 1

UOM: EA

Entry Code: Item

Lawson Self-Service Message - Web Page Dialog

? 1001 is not set up in your item catalog. Would you like to transfer to the Special/Service screen now to order this item?

Yes No

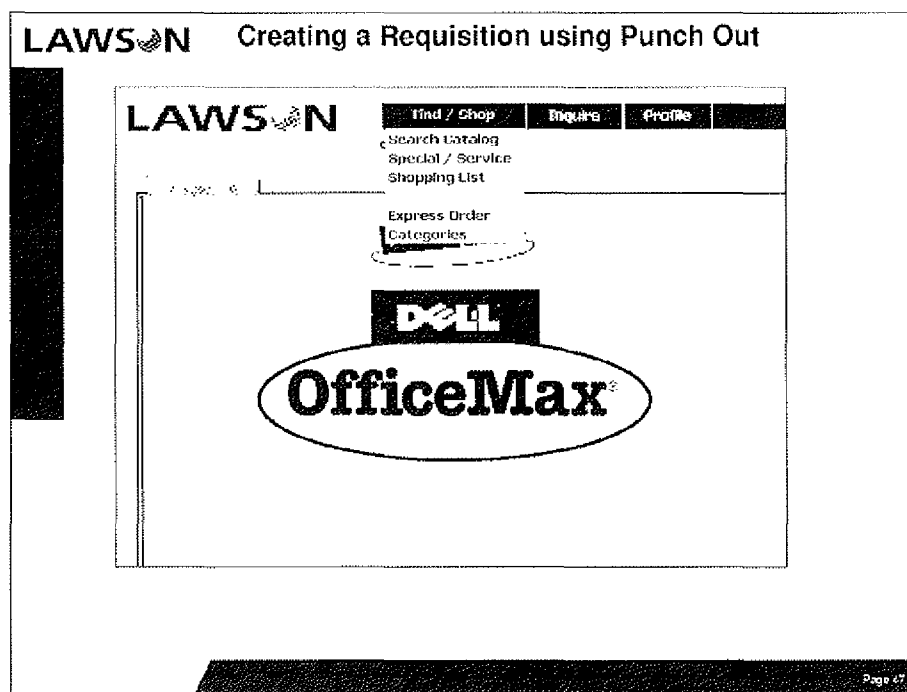
<http://apptn.lawson.com:7091/ns/webapps/Ven/messageDialog.htm> Internet

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Another way to create a Requisition is by using the Express Order. Express Order is designed fast entry if you know what you want to order. In this case, since you now what you want to order, you never have to take your hands off the keyboard. You can enter the item you like by entering the item number. Then tap the tab key, hit the enter key and the system searches for the item. When you see data populate you can hit enter again and voila! Your item is added to the cart!

If you need to order more than a quantity of one, you can tab forward to the quantity field, make your change, and then hit enter to add the item to the cart, or do a shift+tab to move back to the Add button and tap it again to add the item to the cart. You can now Save or Checkout to finish processing your Requisition.

If the system can't find the item, a message will appear to indicate that the item isn't in your item master. You then have the option to transfer to specials/service screen, if you want to order this item as a special item. If you are not allowed to enter specials or services, the message will just indicate that the item was not in your item master and you can try another item number or find/shop another way.



Punchout allows you to access a vendor define site to order items from a specific vendor. The vendor manages this site, but works with you to determine the contents, etc of the site. Once you select the Punchout option, you will see the specific vendors you have determined that you can Punchout to shop with. You can view the Lawson current partner listing available for Punchout on support.lawson.com within the knowledge base. Just search for trading partners.

To begin shopping, click on one of the vendor icons to shop on their website.




Once you have selected the item or items you want to order, you will check out of the vendor's site using "checkout".

LAWSON Item(s) Added to Requisition from Punch Out

http://102.1412.sales.lawson.com - Requisition Self-Service - Microsoft Internet Explorer provided by Lawson

LAWSON Find / Shop Manage Profile Welcome: Karl Kallay 7

Order: 211

Item	Quantity	Cost
8255555 ONG DELL-GEN/EXCOP/ETNR	1.00	\$62.57

Total Quantity: 1.00
Total Costs: \$62.57
Number of Cart Items: 1

New Cancel Print Save Checkout

Once you have checked out at the vendor's site, the system will bring back the item or items into your cart. You can then finish the requisition. Based on the vendor's setup (in Lawson Procurement) you may or may not edit the item you brought back from the vendor site. If the "Allow Change to Punchout Line" flag on the PO vendor (PO10) record is set to No, you can't change any of the item information. Specific vendors require this because they have specific tracking information kept with the record and they do not want this information changed.

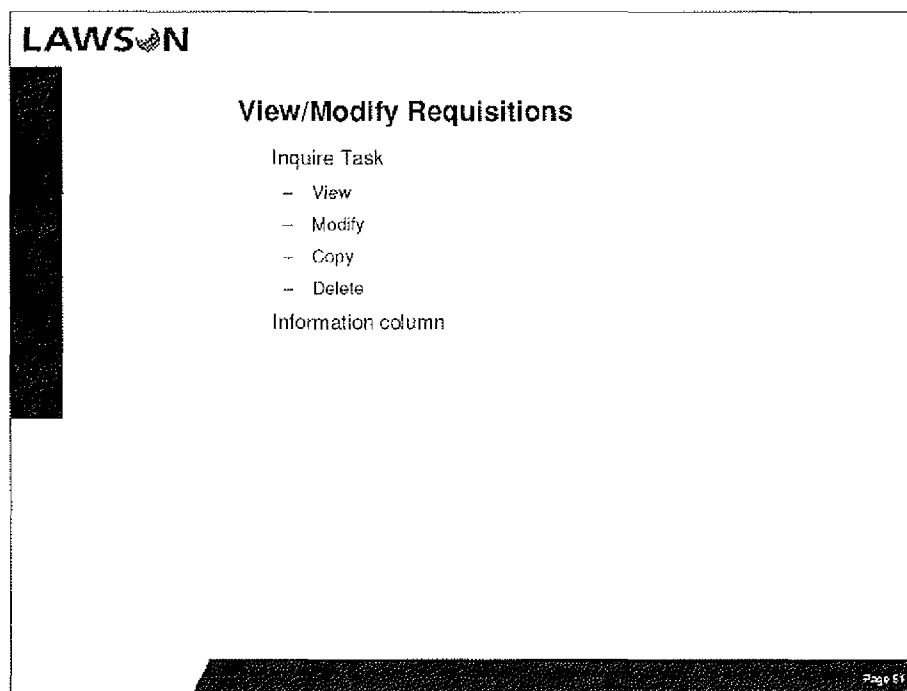
LAWSON

Test Your Knowledge – The “Shopping Experience”

Click on the button to access a quiz about the Requisition Self-Service Shopping Experience.

**QUIZ –
Requisition Self-Service
Shopping Experience**

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Within Requisition Self-Service, you can also view and modify requisitions. Within this area, you can view, change, copy and/or delete information. There is also an information column on the requisition to provide additional information about the requisition if needed.

LAWSON Inquiring on Requisitions – Order Inquiry

LAWSON Find / Shop Inquire Profile

Orders: 174

Line Inquiry

Search Order ☐ Description ☐ Reference Number ☐ Requesting Location ☐

☒ Unreleased ☒ Needs Approval ☒ Rejected ☒ Processed ☒ Closed ☒ In Process

Action	Order	Requesting Location	Value	Delivery Date	Status	Creation Date
Copy View	174	1	0.00	USD	Unreleased	05/01/2007
Copy View	108	FL4	75.00	USD	Processed	01/23/2007
Copy View	107	FL3	75.00	USD	Processed	01/23/2007
Copy View	106	FL2	75.00	USD	Processed	01/23/2007
Copy View	105	FL1	75.00	USD	Processed	01/23/2007
Copy View	80	2200	129.00	USD	Processed	01/23/2007
Copy View	64	1	3280.00	USD	Processed	01/20/2007

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In Order Inquiry, you can inquire on all requisitions you created, and filter the data by requesting location, description, reference number or requisition number. You can also select the specific status or statuses of the requisitions you are looking for.

LAWSON Inquiring on Requisitions – Line Inquiry

LAWSON Find / Shop Inquire Profile

Order: 174

Order Inquiry

1 Search Item Creation Date: mm/dd/yyyy Requesting Location

☒ Unreleased ☒ Needs Approval ☒ Rejected ☒ Processed ☒ Closed

Action	Order Item	Requesting Location	Quantity	Unit Cost	Delivery Date	Status	Create
Copy View	84	8550 1	4.0000	700.00000 USD		Processed	01/23
Copy View	84	8551 1	4.0000	120.00000 USD		Processed	01/23

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Line Inquiry allows you to search by requisition line. It filters data by item, creation date or requesting location, line status or a combination of these.

From either inquiry type you may view or copy the requisition. Copy is an option on all requisitions.

LAWSON Copy Requisitions

Order Inquiry

Search

Item Creation Date mm/dd/yyyy Requesting Location

Unshared Needs Approval Rejected Processed Closed

Select Information to copy
Order: 64

Check All Uncheck All

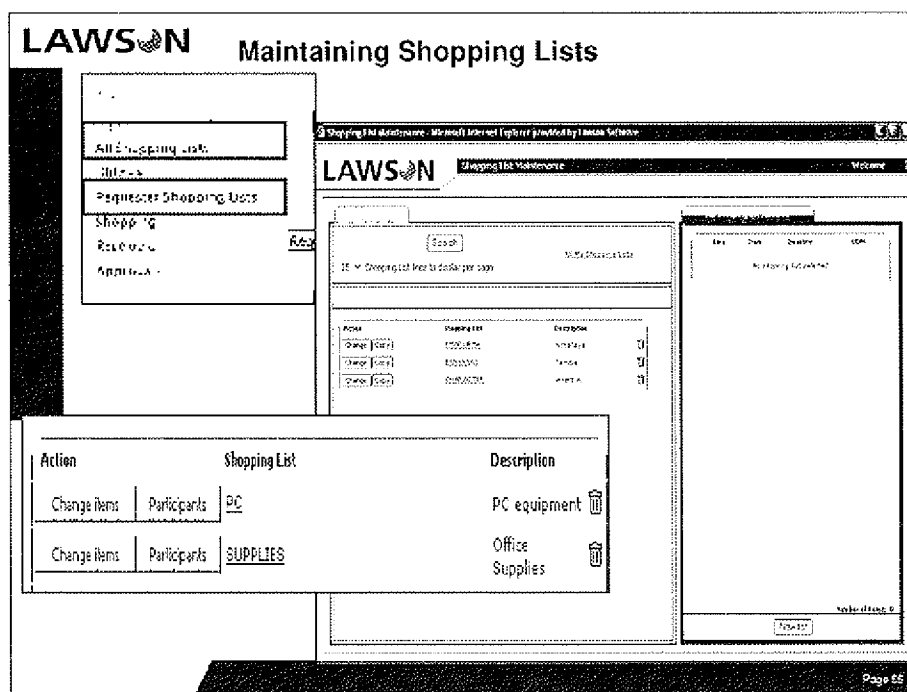
Header Copy Options
Comments ☒
User Fields ☒

Line Copy Options
Distributions ☒
Comments ☒
User Fields ☐
User Analysis ☐

Copy

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If you select the copy feature, you have the option to copy specific header and/or line information. All other information about the requisition not displayed in these options, will automatically be copied over to the new requisition, however if the requester cannot override costs, the costs may not be copied over from the requisition. Also, you cannot copy an item if it came from Punchout.



Some organization allow users to maintain specific shopping lists. From the portal navigation, you can give the All Shopping Lists and /or the Requester Shopping Lists function. The All Shopping Lists bookmark would allow the user to change any shopping lists associated with their company, requesting location and/or requester. If you give the user the Requester Shopping List, the user could only change shopping list in which their requester was a participant. The user can select a specific shopping list and change item information or copy the shopping list. If the user has access to All Shopping Lists, the user can decide to change item information and/or participant information.

LAWSON Update Shopping List Information

LAWSON Shopping List Maintenance Welcome! mrcm2 user

Index: 10/1/11 11:11 AM Description: Shopping List Maintenance

Search

☐ Shopping List line to display per page

☐ Expanded Item List

Line	Item	Description	UOM
1	1000	COPIER PAPER FOR REGS TO 800	EA
2	1000	8	EA
3	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
4	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
5	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
6	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
7	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
8	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
9	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
10	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
11	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
12	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
13	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
14	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
15	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
16	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
17	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
18	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
19	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
20	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
21	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
22	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
23	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
24	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
25	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
26	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
27	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
28	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
29	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
30	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
31	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
32	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
33	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
34	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
35	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
36	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
37	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
38	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
39	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
40	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
41	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
42	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
43	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
44	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
45	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
46	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
47	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
48	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
49	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
50	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
51	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
52	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
53	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
54	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
55	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
56	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
57	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
58	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
59	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
60	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
61	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
62	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
63	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
64	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
65	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
66	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
67	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
68	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
69	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
70	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
71	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
72	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
73	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
74	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
75	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
76	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
77	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
78	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
79	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
80	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
81	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
82	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
83	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
84	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
85	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
86	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
87	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
88	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
89	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
90	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
91	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
92	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
93	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
94	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
95	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
96	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
97	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
98	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
99	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA
100	1000	MANUFACTURER CODE: 800 NUMBER: 107220	EA

Number of items: 100

New List

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You will have the ability to add items, delete items, or change item information on the template, such as the quantity, uom, account information, etc. (More information is available, when you click on the item number). You can also reorder the line numbers. Just put the line number that you want in the field and tab out of the field. The system will then resequence the line number. So for example, if I put 3 in the current line number 5 field, which in this case is staples, once I tab out of this field the system will move staples to line number three and move the rest of the lines down, so line 4 will now be the pens.

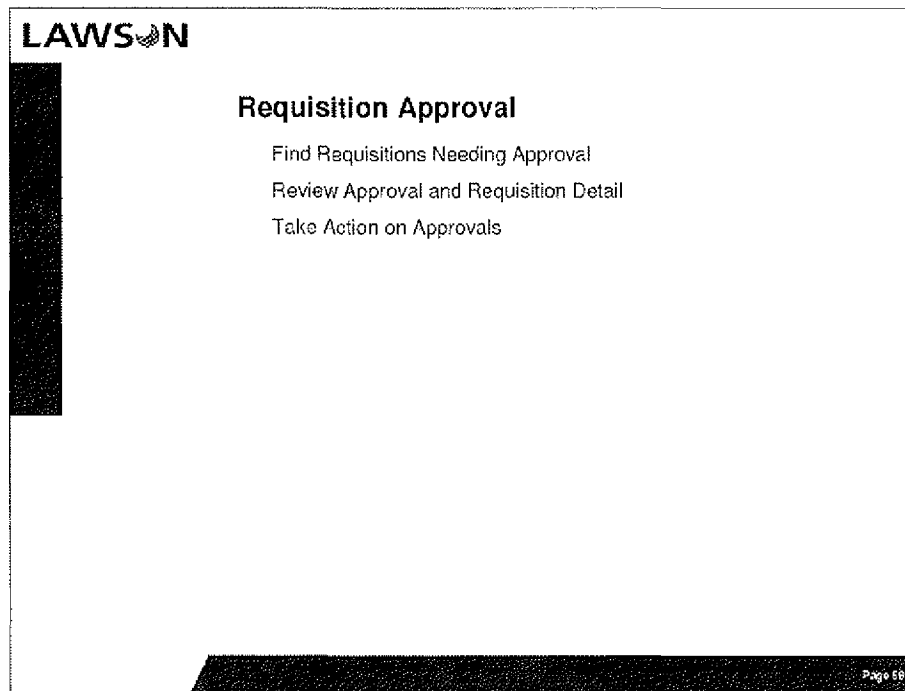
Once you have made your changes you can select another shopping list or select the New List to create a new shopping list. The New List function is available for both All Company and Requester shopping lists maintenance functions.

[illegible]

When you create a new lists, you need to identify a name, description and the From Company and Location where you expect to get the items from. Once you add this information you can then select the specific items to add to your template. The system will only display the items based on the requester setup. So if the requester can only list internal items, only internal items will be available for the user to select to add to their shopping list.

For the All Company lists, the user would need to identify the participants. If a new shopping list is created from the Requester Shopping List, the requester is automatically added as a participant.

You also can print out your shopping list at any time using the Print option available within the shopping list maintenance.



Requisition approvals are also available through Requisition Self-Service. Within the approval process, you can find all requisitions that need approval based on your approval authority, review approval and requisition detail information and take action on the approvals.

LAWSON Approving Requisitions

LAWSON Requisition Approvals

Company: 4002 [1](#)

Authorization ID: [List Requisitions](#)

25 Search records to return 50 page

*Note: requisitions currently awaiting my approval are highlighted

LAWSON Requisition Approvals Welcome: mnm2user

Company: 4002 [2](#)

Authorization ID: [List Requisitions](#)

25 Search records to return 50 page

*Note: requisitions currently awaiting my approval are highlighted

Action	Requisition	Requester	Requested Delivery Date	Value		
Approve Cancel	176	KATHAR		314.00	Comments	1*
Approve Cancel	176	KATHAR		377.50	Comments	1*
Approve Cancel	176	KATHAR		2350.00	Comments	1*
Approve Cancel	176	KATHAR		2110.00	Comments	1*

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When you enter your authorization ID you'll see a list of all requisitions waiting for approval display along with the value and requester. Requisitions highlighted in blue are waiting for your approval, the ones that are not highlighted have to be approved at a lower level before you can approve them.

LAWSON Review Requisitions for Approval

LAWSON Requisition Approvals Welcome msch2.0

Company: 4802 [v]
 Authorization ID: [] [List Requisitions]
 [25] Search records to return per page

*Note: requisitions currently awaiting any approval are highlighted

Approval Code: 3-LVL - three level approval
 Approving Requisitions act Manager
 This order must attain approval level: 2
 This order has had no prior approvals
 Approval Level(s)
 1 1000 - Vice President
 2 500 - Director
 3 50 - Manager

Action	Requisition	Requester	Requested Delivery Date	Value	Comments	
Approve [v]	176	140042		513.00	Comments	[i]
Approve [v]	177	140042		872.50	Comments	[i]
Approve [v]	178	140042		2070.00	Comments	[i]
Approve [v]	179	140042		2070.00	Comments	[i]

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Mousing over the little "i" on the right will display approval info in the header space on the Approval screen. If you place your cursor over the little "i" on the right hand side of the approval line, the Approval code and approval level information is displayed in the screen header area.

This information icon is available on the Requisition inquiry form as well, so you can also get information about requisition approvals from the Inquire screen. A text box would appear to show you the approval information.

LAWSON **Reviewing Requisitions for Approval (Cont.)**

http://appfm.lawson.com?001 - Lawson Software - Microsoft Internet Explorer provided by Lawson

LAWSON

Company: 4002
 Authorization ID: 25 56
 Notes: requisitions currently

Requisition Header Detail
 Approval Needed
 Comments to Print on Headers on Internal Documents
 Comments to Print on Requisitions
 Comments to Print on Purchase Orders
 Comments to Print on Purchase Orders as Trailer Comments
 Comments to Print on Pick Lists
 Comments to Print on Delivery Tickets
 Comments to Print on Receiving Documents
 Requisition Header Display Only Comments
 Requisition Header Attachments
 Bill To Address to Bill on Purchase Orders
 Invoice Comments
 Requisition User

Action
 Approve Reject
 Approve Reject
 Approve Reject
 Approve Reject

Requisition Number	Item	Quantity	Unit Price	Total Price	Comments	Page
128	Item 2	2020.00		Comments	1	
129	Item 2	2020.00		Comments	1	

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You can drill on the requisition link to see details about what is requested. Drill arounds are also available from the ProcessFlow Inbasket if you are using this for Requisition approvals.

LAWSON Requisition Drills – Approval Information

Requisition Header Detail
Approvals Needed
Comments to Print on Headers on Internal Documents
Comments to Print on Requisitions
Comments to Print on Purchase Orders
Comments to Print on Purchase Orders as Trailer Comments
Comments to Print on Pick Lists
Comments to Print on Delivery Tickets
Comments to Print on Receiving Documents
Requisition Header Display Only Comments
Requisition Header Attachments
Bill To Address to Print on Purchase Orders
Invoice Comments

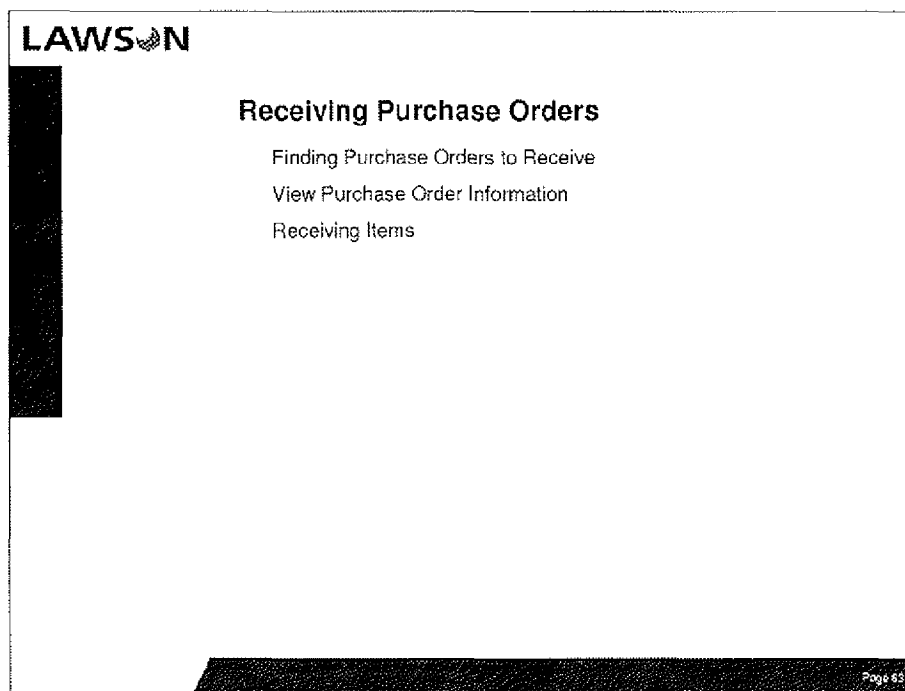
Requisition Lines

Line	Item	Quantity	UOM	Unit Cost
1	6003	4.0000	EA	39.99000
2	6001	4.0000	EA	125.60000
3	6002	4.0000	EA	150.00000
4	6005	4.0000	EA	200.00000

Requisition Header Detail
Requisition Line Detail
Comments to Print on Internal Documents
Comments to Print on Delivery Tickets
Comments to Print on Requisitions
Comments to Print on Purchase Orders
Comments to Print on Pick Lists
Comments to Print on Receivers
Requisition Line Display Only Comments
Invoice Comments
Requisition Header
Line GL Distribution

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You can get Requisition header information or line specific information.



Requisition Self-Service also allows users to receive items. This may be the case where items are directly sent to an area and they are responsible for receiving the items, rather than having one centralized area receive all items and then distribute them.

Within the receiving process, you can identifying additional information if needed. (I.e. back orders, serial, lot, bins numbers, etc.)

[illegible]

There is a new look and feel and some changes to functionality to allow you to receive open PO's from a wider selection of data. The PO's on the initial page include all open PO's without receipt activity for a company.

From within that selection you can search by PO number or PO code, you can also sort the open PO by entering a company, buyer, requester, requesting location and/or vendor and doing a search.

You're no longer limited to receiving only your own requisition PO's, although the Company you have set up in RQ04 on your requester will default into the page when you log into the service center.

You can use the Select/Filter fields to find PO lines open for receiving or sort through PO's to find what you want to receive.

Click on the “View PO” button to see information about the purchase order.

LAWSON View the Purchase Order Information

LAWSON Receiving Self-Service Welcome mscn2.0

PO# 700 PO Release 0

PO Date 01/01/2007 Address 5578 Market Blvd
 Vendor Number 2053
 Vendor Desk Mates (RM)
 Contact
 Phone Number ext: City St Paul State MN Postal Code 55102

Back

Line Number	Item	Description	Quantity Ordered	Previously Received	DEM	Unit	Extended Cost	Ship To	Delivery Date
1	61000	THINGS TO DO PADS	10.0000	0.0000	2X	4.25000	42.50	1	01/01/2007
2	61000	BINDER CLIP	5.0000	0.0000	3X	2.75000	13.75	1	01/01/2007
3	01000	CORNER PAPER, 200 SHEETS	1.0000	0.0000	200	1.00000	12.00	1	01/01/2007
4	65002	PRIN, BELL POINT, B10	6.0000	0.0000	200	4.00000	24.00	1	01/01/2007

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From the "View PO" functions, you can view the header information as well as the line information.

LAWSON Receive Items

LAWSON Receiving Self-Service Welcome nscm2 user

PO: 397 80 Release: 0


PO Date: 01/01/2007 Address: 5670 Market Blvd
 Vendor Number: 2023
 Vendor: DOD MFG (CA)
 Contact:
 Phone Number: - ext City: St Paul State: MN Postal Code: 55102

Back Select All Purchase Submit

Bin/Lot/Label:

Line Number	Cancel	Item	Description	Quantity Ordered	Previously Received	Quantity Remaining	Unit	Received	Quantity Received	Cancel BackOrder	Bin
1	<input type="checkbox"/>	33032	THINGS TO GO BAGS	10 0000	0 0000	10 0000	EA	<input type="checkbox"/>		<input type="checkbox"/>	
2	<input type="checkbox"/>	33039	SINGER CLIP	5 0000	0 0000	5 0000	XX	<input type="checkbox"/>		<input type="checkbox"/>	
3	<input type="checkbox"/>	33232	COPYER PAPER 200 SHEETS	4 0000	0 0000	4 0000	BOX	<input type="checkbox"/>		<input type="checkbox"/>	
4	<input type="checkbox"/>	33032								<input type="checkbox"/>	

Lawson Self-Service Message - Web Pa...

 Receiver 147
Release complete - continue

<http://apptm.lc: Internet>

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Once you select a purchase order, you just click on the PO number and then you can start receiving the items.

Once a PO is selected for receipt you have the option to receive all, when you click the "Select All" button. The "Select All" function populates all the lines quantity with the remaining quantities. You could also enter the received qty and select the "Review" function, which would add the receipt, but not release it (in case you want to make any changes). Or you could add the quantities and select the "Submit" function which releases the receipt. Once you release a receipt, you can't make any changes.

When you are receiving, you can identify if you want to cancel any backorders on a partial receipt, or cancel the remaining. You can enter Bins, Lot and Serial Tracking information on your receipt, as well as MSDS information.

If you made mistakes, someone in your organization would have to do a receiving adjustment to correct this. If you haven't received all of the items or quantities, the purchase order will be available to receive the remaining quantities. Cancel deletes the record.

Once you click Submit, you'll get confirmation that the Receipt is released

LAWSON Receiving Items (Continued)

LAWSON Receiving Self-Service Welcome misc02

SHIP TO: PURCHASE: RECEIVED BY:

Received Date: 05/07/2009
 Supplier: UNIVERSTAD
 Vendor: 2394
 Location:

Reference Number: 15
 Buyer: 511 of Lacing
 Tracking Number:

Item: Code: Event:

Line Number	Item	Description	Quantity Ordered	Previously Received	UOM	Quantity Received	Cancel Backorder	MSRP Included	MSRP Discount	Comments	Cancel
1	2000	HP - PAGER PC	2.0000	0.0000	EA	2.0000	<input type="checkbox"/>	<input type="checkbox"/>			
2	2000	PRINTER 100	2.0000	0.0000	EA	2.0000	<input type="checkbox"/>	<input type="checkbox"/>	910160		

LAWSON Receiving Self-Service Welcome misc02

PO: 171 PO Release: RECEIVED BY:

Item: 2000
 Description: HP - PAGER PC
 Line Number: 1
 Received Quantity: 2.0000 Detail Quantity: 0

Cancel: Update: +

Action	Quantity	Unit
Add		
Change		
Delete		

If the item is lot or serial tracked, once you add the quantity, the system will identify that you need additional information. This can be accessed through the detailed button, which is available once you add the quantity received. From this button you can add lots or serial numbers for the item or items.

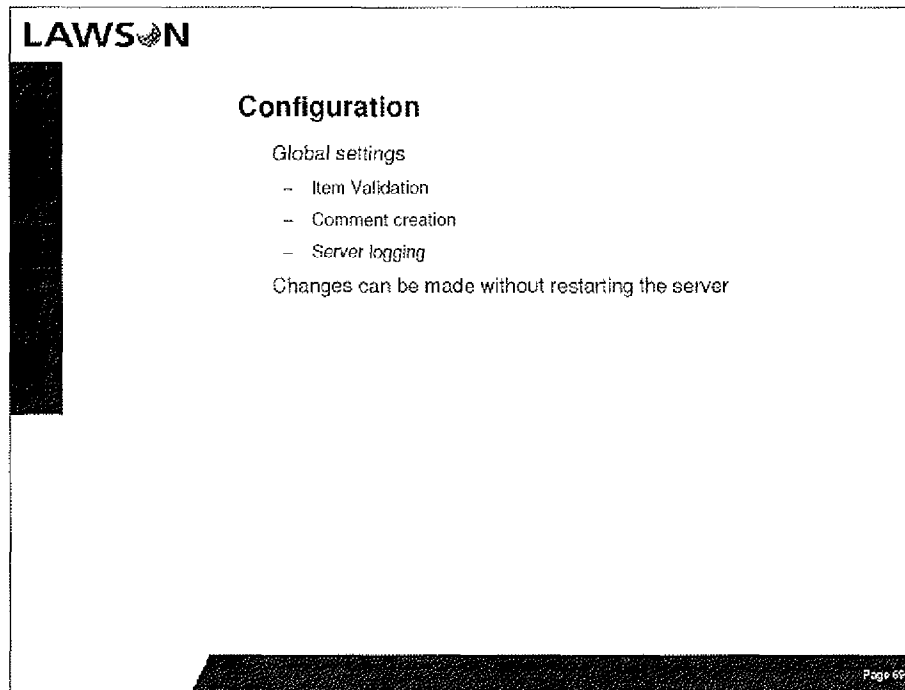
LAWSON

**Test Your Knowledge – Requisition Approval &
Requisition Self-Service Receiving**

Click on the button to access a quiz about the Requisition Self-
Service Approval & Requisition Self-Service Receiving

**QUIZ –
Requisition Self-Service
Approval & Receiving**

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Requisition Self-Service delivers a configuration file which allows you to set some global parameters such as item validation, comment creation and server logging.

Requisition Self-Service (or RSS) is now delivered as a war or ear file (rss.war, rss.ear). Each deliverable is a full deployment of the product.

RSS Utility page (/rss/html/utility.htm) replaces the Requisition Settings page. It allows RSS configuration changes to be made without stopping and restarting the server. There is also a link for client defined Help text. The Help/About link displays the RSS version for easy access to all users.

LAWSON

Configuration File

Control Several Settings

Global Settings

Changes made without restarting the server

rss_config.xml file

- 9.0 Technology: \$LAWDIR/system
- 8.0.3 Technology: \$LAWDIR/system or in remote configurations

Rss.war ensures correct configuration file is deployed.

Reloading and creating translation files now available

- <http://server:port/rss/html/utility.htm>

```
rss_config.xml
-->
<rss fileVersion="09_00_00_03_02">
  <setting id="allow_company_select" value="false"/>
  <setting id="allow_debug" value="true"/>
  <setting id="allow_trace" value="true"/>
  <setting id="browser_check" value="true"/>
  <setting id="confirm_deleted" value="none"/>      <!-- all, some, none -->
  <setting id="required_fields" value="false">
    <field id="RLN_DESCRIPTION" indicator="true" validate="true"/>
    <field id="RLN_QUANTITY" indicator="true" validate="true"/>
    <field id="RLN_ENTERED_LOD" indicator="true" validate="true"/>
    <field id="RLN_TRAN_UNIT_COST" indicator="true" validate="true"/>
  </setting>
  <setting id="show_advance_search" value="false"/>
  <setting id="help_help" value="false">
    <helplink id="profile" url="help.htm" width="" height="">
    <helplink id="require" url="help.htm" width="" height="">
    <helplink id="cost_desc" url="help.htm" width="" height="">
    <helplink id="search_catalog" url="help.htm" width="" height="">
    <helplink id="express_order" url="help.htm" width="" height="">
```

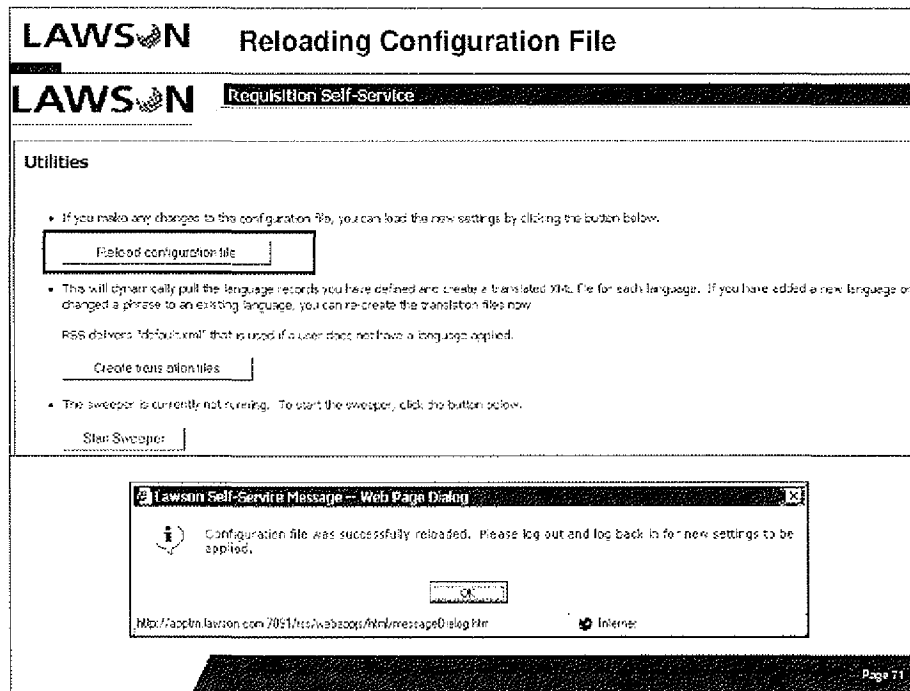
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Requisition Self-Service's configuration file allows you to control several settings. These are global settings, so not all users should be given access to this file. Once you make changes to the configuration file, the changes can be deployed without restarting the server. So if you have decided later in your implementation or later in the process that you want to change some of the configuration, you can do this at any time.

The configuration information is stored in the `rss_config.xml` file. 9.0 Technology stores this information in the `$LAWDIR/system` directory. 8.03 Technology store this information in the same are, however it may also be in remote configurations.

The `rss.war` file ensure that the correct configuration file is deployed. For example, a client upgrades with a new `rss.war` and does not upgrade the `rss_config.xml` file, they will get an error indicating that the `rss_configuration` file is not the correct version. The version number is located within the file.

Reloading and creating translation files are now easily available. They can be found at <http://server:port/rss/html/utility.htm>



If you make any changes to the configuration file, you can load the new setting by selecting the reload configuration file setting. If you are using locations (for different languages), the create translation files will rebuild the language file so you can get the translations displayed on the screen. The sweeper features is part of the functionality to transmit cxml files to the vendor. Consult the Procurement Punchout Administration guide for more information on this.

LAWSON

Configuration File Client Parameters

<client>

<setting id="allow_company_select" value="true"/>

- Users can change the company on a requisition before requisition #

<setting id="confirm_deletes" value="some"/>

- If want confirmation dialogs before completing deletions
- Choices are: All, Some, None

<setting id="allow_hidden_frames" value="true"/>

- If you want to hide unwanted fields

<setting id="required fields" value="true"/>

- Indicate whether a field is required for all users.
- Item, Description, Quantity, Entered UOM, Transaction Unit Cost

<setting id="show advance search" value="true"/>

- If you want the Advanced Search tab to display on catalog search.

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The configuration file allows you to modify specific information on the client. Some may help you with specific display information or selections, and others on helping with troubleshooting issues, etc.

For example, the "allow company select" indicates whether users can change the company on a requisition before the requisition is assigned a number.

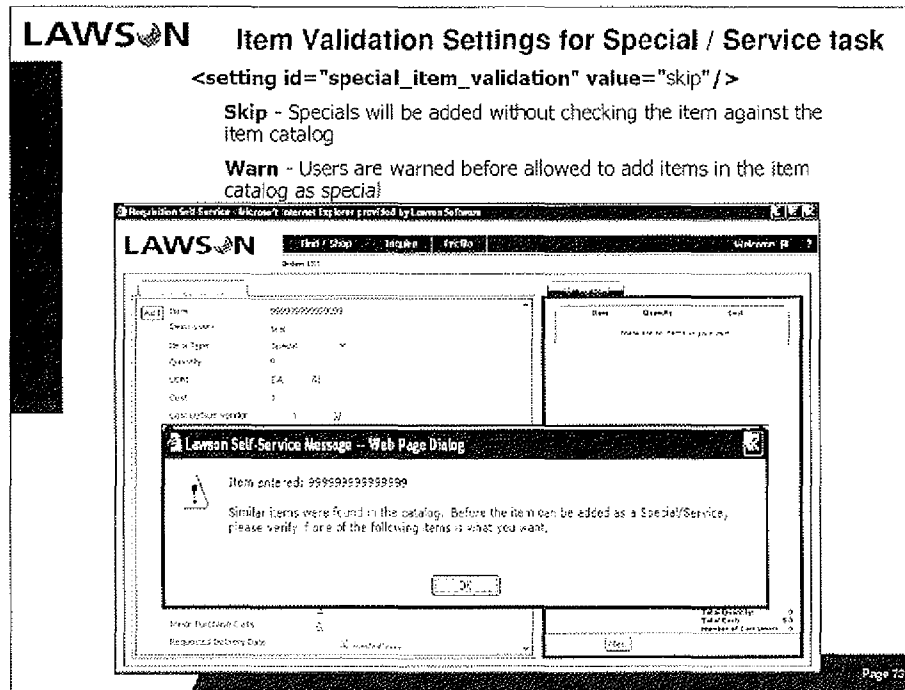
The confirm_delete setting identifies if you want to have a confirmation dialog box appear when completing deletions. This can be set to all, which means you receive a confirmation before any deletion; Some, which indicates that you only receive a deletion message when deleting large items, such as a requisition or your entire cart. You don't receive a confirmation when deleting individual lines or items; None indicates that you don't receive any message before deletions.

Within Requisition Self-Service you can indicate whether you want to hide unwanted fields and corresponding labels. You need to indicate the specific field ID you want to hide. You can find the field ID by holding down the Control, Shift and 'O' keys. You see information that appears in the status bar at the bottom of the screen. The ID value is the field ID. You should be careful not to hide any required fields as the system may not be able to create requisitions if this information is not available.

If you set required field values to true, the system will display required fields in a yellow color so they know which fields they need to define. We discussed this previously when talking about creating a requisition for a special item.

Show advance search allows you to display the advanced tab functionality within the catalog search. This would allow you to ignore specific records.

You can even display specific help text you may have created by setting the show_help values to true and indicating the url address where the text resides.



As we talked about previously, when creating a requisition from a special-type item, you can decide whether you want to validate against this item. The configuration contains the item validation parameter. Item validation indicates if you want the system to validate if an item is already in the item master when you are creating a special. Your choices are Skip or Warn.

Skip will add the special item without checking the item against the item catalog. This is how the system previously worked.

If you set this parameter to "warn", users are warned before they are allowed to add items as specials. They could then choose to add the items from the catalog search instead. For example, if I enter a specific item 9999999999999999, the system will give you a message that if the same item or similar items are found.

LAWSON Item Validation (Continued)

Regulation Self-Service - Microsoft Internet Explorer provided by Lawson Software

LAWSON [Home](#) [Help](#) [Sign Out](#) [Profile](#) [Welcome](#) [7](#)

Verify Existing Items

Item provided: 0000000000000000

If none of the items below match, click Back to return to the Special/Service page and add the

☒ - Item(s) that you have entered, via a data file or your browser screen.

Add to Cart	Quantity	Description	Unit Price	Unit Cost	Unit Tax
<input type="checkbox"/>	100	Item Description: 1000, Number: 0000000000000000	10	10.00	USD
<input checked="" type="checkbox"/>	100	Item Description: 1000, Number: 0000000000000000	25	25.00	USD
<input checked="" type="checkbox"/>	1000	Item Description: 1000, Number: 0000000000000000	10	10.00	USD

Total Item(s): 0
Total Cost: 0.00
Number of Items: 0

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When you click OK, the system will show you the items that matched. You can then either select a specific item or go back to the special/service screen.

LAWSON Special/Service Comment Setting

`<setting id="special_service_comments" value="auto"/>`

Indicates if you want comments to appear when adding specials/services.

Auto - Comments are created only if description exceeds 30 characters

Add Item
Description

Explicit - Comments are available through a separate input area and description is limited to 30 characters

Add Item
Description
Comments

None - Comments are not available from the special screen and description is limited to 30 characters

Add Item
Description

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Again as we talked about when creating a requisition from a special/service, from the configuration file allows you to control if you want comments to appear when adding specials/services.

If you select Auto, then comments are created only if the description exceeds 30 characters. Explicit indicates that comments are available through a separate area and the description is limited to 30 characters. If you select none, comments are not available and the user can only enter a 30 character description

LAWSON

Configuration File Client Parameters (Cont.)

<client>

<setting id="allow_debug" value="true"/>

- Setting the value to true means **Ctrl-Shift-d** will open the debug page at any time
- Setting the value to "false" will prevent Ctrl-Shift-d from opening the debug page

<setting id="allow_trace" value="true"/>

- Setting the value to true means **Ctrl-Shift-t** will open the trace window at any time
- Setting the value to "false" will prevent Ctrl-Shift-t from opening the trace window

<setting id="browser_check" value="true"/>

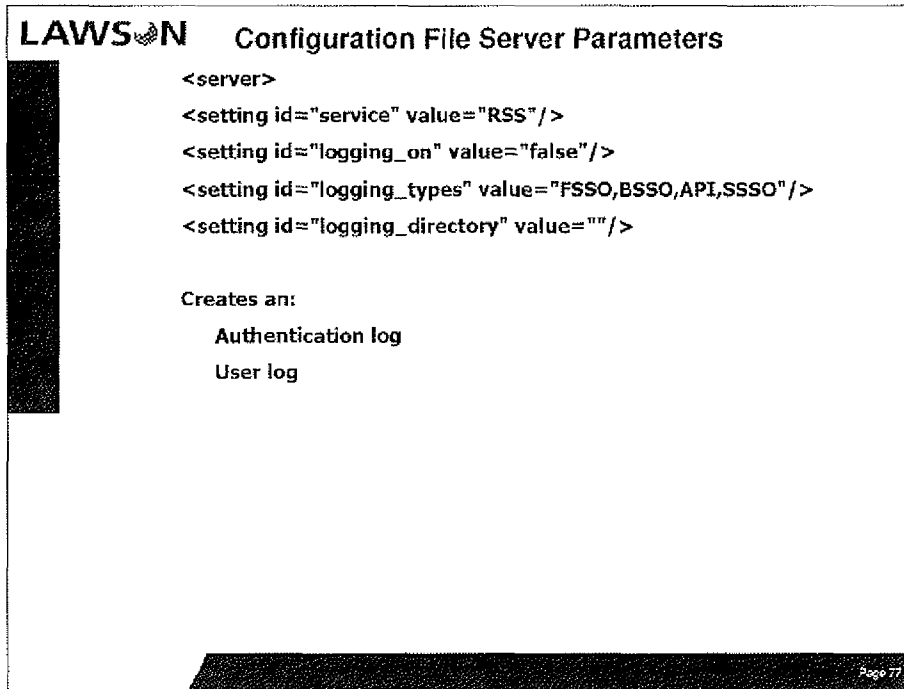
- Indicates your are using IE6+ and Firefox 1+

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The debug allows you to open the debug page, which may help you identify errors so you can resolve issues, at any time by pressing Control-Shift-d.

If you allow trace, this will let you open a track window using the Ctrl-Shift-t function at any time.

The browser_check setting indicates whether you are using Internet Explorer 6+ and Firefox 1+. Set this to false if you are using another web browser that may not be fully supported.

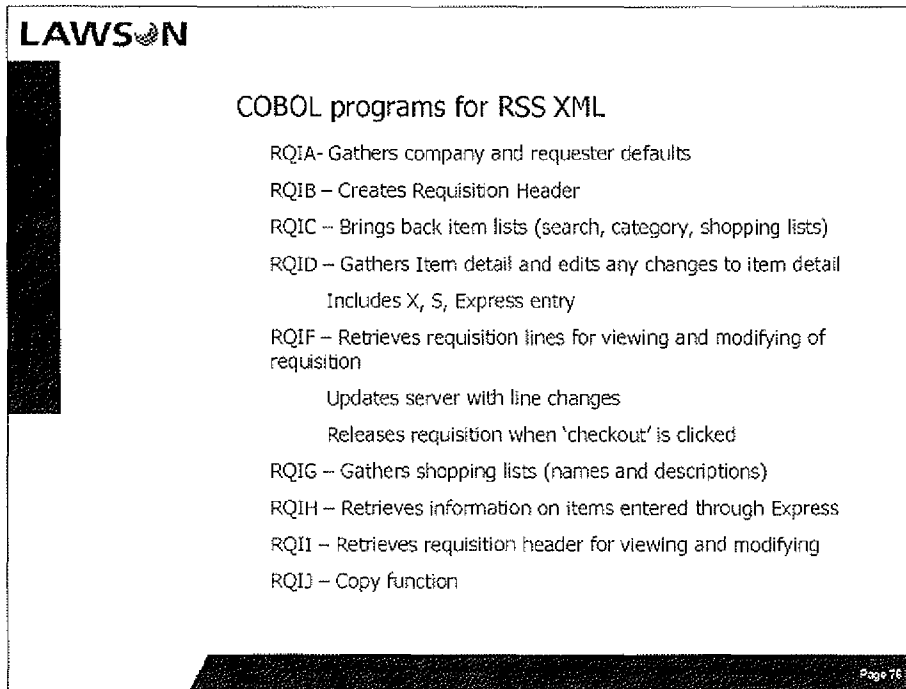


To turn server logging on/off, change the "logging_on" setting to "true" or "false" in the rss_config.xml file (true turns logging on, false turns logging off)

Go to /rss/html/utility.htm and click the "Reload configuration file" button (a bookmark exists for this page). Turning debug on creates an authentication log and a user log.

The authentication log, rss_AUTHENTICATION.log debugs authentication errors. There is a user log to log specific information tracked or created by a user. The authentication log is different because the user is not yet signed in and RSS doesn't know who they are.

The user log is created and called rss_username_#.log where # is a unique number. This will log any actions taken for the user within Requisition Self-Service.



Requisition Self-Service is similar to Requisitions (RQ10), however it is also quite different. Requisition Self-Service uses server based code, so server information from Requisitions (RQ10) and web-based code. Requisition Self-Service are running the displayed Cobol programs in the background to allow for specific search capabilities, etc.

The screenshot displays a software interface with the 'LAWSON' logo in the top left corner. Below the logo is a vertical black bar. The main content area features the heading 'Test Your Knowledge – Configuration' followed by the instruction 'Click on the button to access a quiz about Requisition Self-Service Configuration Options.' A rectangular button with a black border is centered below this text, containing the text 'QUIZ – Requisition Self-Service Configuration Options'. A thick black horizontal bar is positioned at the bottom of the interface, with the text 'Page 76' visible on its right side.

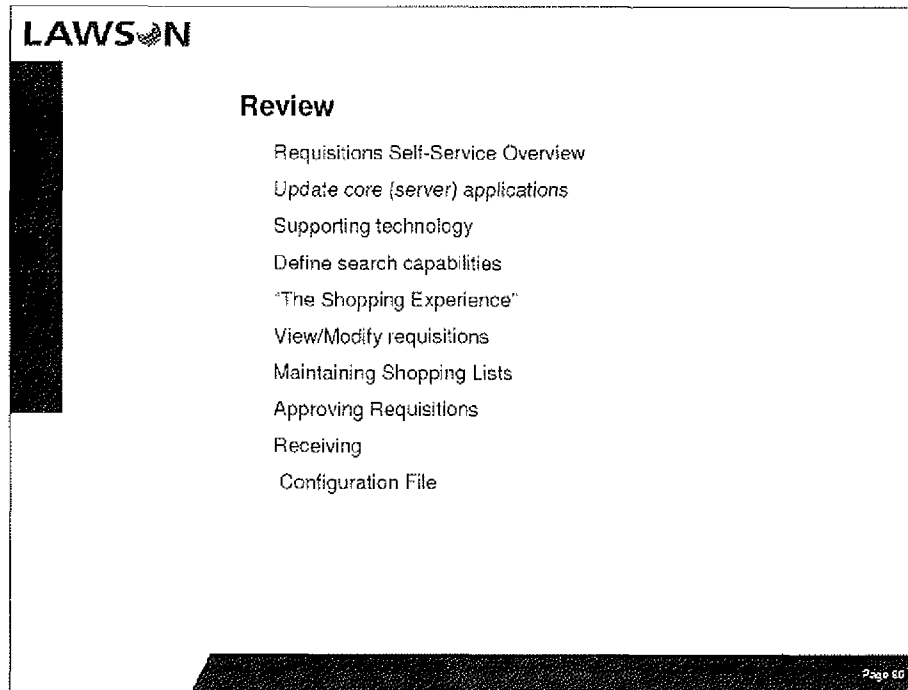
LAWSON

Test Your Knowledge – Configuration

Click on the button to access a quiz about Requisition Self-Service Configuration Options.

**QUIZ –
Requisition Self-Service
Configuration Options**

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In review Requisition Self-Service contains shopping and maintaining requisitions and shopping lists, requisition approvals and receiving. There is some specific setup that is needed to use Requisitions Self-Service. Some setup is specific to what type of functions you want to allow within Requisition Self-Service as well as some supporting technology. The configuration file also allows you to set some global setting to determine how specific functions may work within Requisition Self-Service.

